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**International Trends and Implementation Challenges of Secondary
Education Curriculum Policy:
The Case of Bulgaria**

**Doctoral Dissertation
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EXECUTIVE SUMMARY IN SPANISH

Al inicio del siglo XXI, la educación no es sólo un factor determinante para la formación del ciudadano y su plena realización como ser humano sino que emerge como un sector estratégico con una importancia clave para la economía global competitiva (producción basada en las nuevas tecnologías, mercados laborales internacionalizados, etc.). Por este motivo, el futuro de cada nación independientemente de su desarrollo social y económico, está hasta cierto punto determinado por su capacidad para adaptarse rápidamente a condiciones cambiantes y poderse involucrar de forma más efectiva en estos procesos globales. De ahí la importancia de las políticas educativas para el normal desarrollo y progreso de las sociedades contemporáneas.

En estos momentos, en las agendas de las políticas educativas tanto de los países más desarrollados como de los económicamente menos desarrollados, el principal objetivo consiste muy especialmente en la universalización del acceso a la enseñanza secundaria. Este objetivo tiene especial relevancia por cuanto la formación recibida en la educación secundaria incidirá y reforzará la educación para toda la vida (Banco Mundial, 2005).

La gran demanda para acceder a una educación secundaria de alta calidad y eficacia fuerza a los sistemas de enseñanza secundaria en la mayoría de los países del mundo a reaccionar para intentar adaptarse a esta situación. La educación secundaria se hace progresivamente obligatoria y cada vez más universal en muchos países del mundo, y esto se traduce en desafíos cada vez más complejos. Actualmente se plantea un doble reto que consiste, por un lado, en incrementar el acceso a la educación secundaria y por otro en mejorar su calidad y adecuación a las necesidades de la sociedad.

Igualmente, es ampliamente reconocido que la renovación de los planes curriculares es uno de los componentes más importantes de las reformas educativas con miras a mejorar su calidad. La atención a los planes curriculares es un prerequisite no sólo para mejorar el potencial del capital humano de los graduados de secundaria, sino también, para retener los jóvenes en los centros de enseñanza. La falta de adecuación de los planes curriculares de

secundaria es, en efecto, uno de los factores fundamentales que la mayoría de las veces incrementan la distancia entre escuela y cultura juvenil, hasta el punto de que la escuela no es suficientemente atractiva para los jóvenes y no responde efectivamente a sus necesidades reales.

* *
*

La primera parte de nuestro estudio (Capítulos 1-5) presenta el campo de investigación y el proceso metodológico seguido para llevar a cabo este estudio analítico. El primer capítulo explica que nuestra investigación se circunscribe a la política y administración de la enseñanza secundaria no sólo por la necesidad de acotar el campo sino también y sobre todo porque la educación secundaria se considera crucial en los procesos de formación del ciudadano, debido en particular a su capacidad para funcionar como puente entre educación primaria, educación terciaria, y mercado laboral. Dentro de la enseñanza secundaria, analizamos sobre todo las materias de los estudios sociales, (*Historia, Geografía y Educación Cívica*), y de humanidades (*Lengua y literatura nacional y Lenguas extranjeras*) ya que éstas nos permiten analizar la carga ideología en el currículo escolar y al mismo tiempo establecer el grado de modernización de sus contenidos. El campo geográfico del estudio abarca todos los países de la OCDE y los países Balcánicos, centrándose además en el caso nacional de Bulgaria.

Las preguntas de investigación y los objetivos del estudio se presentan en el segundo capítulo donde también se describen los diferentes pasos seguidos para llevar a cabo esta investigación.

Para analizar el proceso de la reforma curricular en Bulgaria es necesario fijarse en las tres grandes áreas siguientes:

1. **Los contenidos de enseñanza y su organización.** Se presume que una reforma curricular cambiará por un lado los contenidos de enseñanza (incrementando su relevancia, incluyendo nuevos elementos, eliminando tópicos arcaicos, etc.) y por otro lado, revisará la organización de los contenidos (creando amplias áreas

curriculares, mejorando la interconexión entre asignaturas individuales, etc.), así como el tiempo específico asignado a cada materia del currículo.

2. **Las competencias que necesita el profesorado para poder aplicar el nuevo currículo.** Se supone que los maestros deberán adquirir competencias de enseñanza apropiadas y conocimientos específicos de su materia de especialización para poder trabajar con éxito los nuevos contenidos con sus estudiantes. Las nuevas competencias necesarias nos permitirán ver hasta qué punto se hizo un cambio esencial en el contenido educativo y su práctica de enseñanza. Esto, a su vez, nos permitirá estimar los efectos de la reforma curricular sobre el proceso educativo global en el país.
3. **La opinión y el comportamiento de los diferentes estamentos y actores involucrados en el proceso educativo.** Los diferentes estamentos y la sociedad civil siempre manifestarán una determinada posición respecto de la reforma curricular, la cual nos permitirá establecer el grado de su satisfacción con los cambios implícitos de la reforma, su implicación y compromiso con la implantación de la reforma y, en definitiva, el éxito potencial de dicha reforma.

El análisis de estas tres áreas debería servirnos para obtener conclusiones sobre las siguientes preguntas de investigación:

1. Si la reforma se estaba efectivamente llevando a cabo y en qué medida.
2. Si esta reforma responde a las expectativas y necesidades de la sociedad Búlgara y muy especialmente de los actores concernidos.
3. Si la reforma curricular en Bulgaria llevará a un mayor grado de convergencia con los sistemas educativos de los países de la OCDE.
4. Si la reforma educativa no solo incide en la adquisición de saberes o competencias, sino en la formación ética y ciudadana de los estudiantes.
5. Si existen obstáculos y problemas en el proceso de implantación de la reforma que podrían incluso condicionar de modo negativo el planteamiento de futuras reformas en el sector.

Para poder contextualizar nuestros resultados del caso búlgaro en los procesos globales de reformas curriculares, los capítulos 3-5 de la primera parte del estudio ofrecen una panorámica de las reformas curriculares actuales de secundaria que se están produciendo en todo el mundo, identificando algunas tendencias generales en materia de políticas curriculares. En concreto, el tercer capítulo presenta la situación global de cambios en el contenido de la educación secundaria ilustrando algunos ejemplos de países más representativos. El cuarto capítulo presenta tendencias comunes por lo que respecta a la reorganización y reestructuración de los contenidos de las enseñanzas secundarias. En el quinto capítulo se presentan los aspectos más globales y significativos de las reformas educativas realizadas en las últimas décadas.

Queda así de manifiesto que la mayoría de los países de la OCDE han empezado a tratar asuntos relacionados con la revisión y reforma de los planes curriculares de enseñanza secundaria y ello desde principios de los años 80, mientras que este proceso se ha retrasado en países en transición (como Bulgaria, Rumania, Croacia, Albania, Antigua República Yugoslava de Macedonia, etc.), afectados por cambios sociopolíticos radicales.

Independientemente de las diferencias en el tiempo de implementación de dichas reformas, se constata que las políticas curriculares en los países Balcánicos se acercan a las de los países desarrollados de la OCDE. En ambos grupos de países se observan reformas curriculares en la enseñanza secundaria que miran hacia:

- el desarrollo de nuevos planes de estudios para introducir nuevas áreas de conocimiento y competencias como nuevas tecnologías, economía, educación cívica, formación profesional, educación para la formación de la personalidad, orientación personal y profesional;
- la actualización de las materias y de los contenidos con nuevos conceptos y valores emergentes en la sociedad moderna. Por ejemplo, se enseña el desarrollo sostenible a través de la *Geografía*, la educación para la salud mediante la *Educación física*, los nuevos valores sociales y la educación para la ciudadanía europea a través de las asignaturas de *Historia* y *Geografía*;

- la introducción de nuevos objetivos y de contenidos que van más allá del ámbito nacional y que ofrecen una perspectiva europea e internacional. Es importante por ejemplo, que la *Historia* y la *Geografía* se enseñen para fortalecer la necesidad de entendimiento mutuo entre culturas y países;
- la reorganización del contenido educativo para equilibrar el tiempo atribuido en las diferentes materias, incrementando flexibilidad y diversificación, y permitiendo interdisciplinariedad.

Estas son las tendencias generales en las agendas de política curricular tanto en los países de la OCDE como en los países Balcánicos. Sin embargo, la medida en la que estos cambios curriculares se han introducido es muy distinta dependiendo del país de que se trate. Aunque los objetivos de la enseñanza secundaria son sin duda ambiciosos, no es fácil saber todavía, por ejemplo, hasta qué punto los currícula de estudios sociales y las humanidades están teniendo un impacto en la promoción de la educación intercultural y de la inclusión social, a través de la vida diaria y prácticas didácticas en las escuelas secundarias.

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En la segunda parte de nuestra investigación (Capítulos 6-9) estudiamos la situación particular en la que se encuentran los países Balcánicos y analizamos el caso específico de Bulgaria.

Bulgaria, el país en transición económicamente más desarrollado de la región que ingresó en la Unión Europea en enero de 2007, es un ejemplo prototípico de aplicación de una reforma educativa y muy especialmente en el ámbito de la enseñanza secundaria. Tanto es así que el Banco Mundial decidió en su día que ese antiguo país comunista podía ser tomado como referencia para analizar la eficacia de una reforma educativa requerida para equipararse con los países democráticos occidentales.

El primer capítulo de esta segunda parte (capítulo 6) se dedica a la presentación del contexto nacional de Bulgaria: de su población y su situación socio-económica y política. En los

capítulos 7 y 8 se estudia la evolución del sistema educativo Búlgaro, y en particular del contenido de las áreas curriculares tomadas en cuenta: Estudios sociales y Humanidades, antes y después del cambio del régimen en el país. El capítulo 9 resume los cambios más destacados en relación de la enseñanza secundaria en Bulgaria en el curso de la transición sociopolítica de este país.

Como es sabido, el cambio curricular es un proceso largo y complejo para un país tanto durante el diseño de la reforma como durante su propia implementación. Esto es debido a que una reforma curricular no sólo implica un cambio en el contenido educativo, sino que también exige reformas suplementarias e intervenciones en el conjunto del sistema: evaluación de alumnos, formación de formadores, sistema de inspección escolar, provisión de recursos didácticos, etc.

La falta de coordinación de reformas en estos ámbitos puede causar un vacío entre teoría y práctica. Esto puede conllevar a su vez una falta de correspondencia entre los nuevos planes curriculares aprobados por los gobiernos (los que posteriormente son implementados por los profesores) y los que finalmente obtienen los alumnos. Todo esto puede repercutir negativamente en el impacto de las reformas curriculares sobre la calidad de la educación.

Así queda de manifiesto en el presente estudio que, para los países Balcánicos con economías en transición y que intentan llevar a cabo reformas educativas con recursos financieros y humanos restringidos, los desafíos para implementar dichas reformas con éxito son mucho mayores que para los países desarrollados.

En 1989, Bulgaria inició un proceso de reformas políticas y socioeconómicas profundas que han despertado en los ciudadanos expectativas de mejoras importantes y rápidas de la libertad individual y de las condiciones de vida. La necesidad de reformar la educación secundaria apareció así junto con la estabilización de la democracia, sin embargo las reformas esenciales no se han implementado hasta el curso académico 2001/02.

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Para dar cuenta del proceso de implementación de las reformas educativas en Bulgaria, en la tercera parte de nuestro estudio (Capítulos 10-12), planteamos y contestamos las siguientes preguntas:

- ¿Cómo se ha implementado la reforma curricular de secundaria en Bulgaria desde el cambio del régimen hasta el día de hoy?
- ¿Cómo se han implementado las reformas complementarias para apoyar la introducción de los nuevos planes curriculares?
- ¿Que evidencia existe sobre el impacto de estas reformas en la calidad de la educación secundaria hoy en día en Bulgaria?
- ¿Qué implica el cambio del contenido educativo y de su organización para la formación de los profesores de secundaria?
- ¿Están actualmente los profesores de secundaria preparados para asumir todos estos cambios radicales que marcan la historia de la educación búlgara?

Así planteada, nuestra investigación debería poder contribuir a superar las carencias informativas acerca de las barreras existentes en Bulgaria para implementar la reforma curricular de secundaria y acerca de la manera en que se han llevado a cabo las demás reformas que venían a apoyar la introducción del nuevo currículo. Se requería por lo tanto un trabajo de campo que analizara en profundidad las intervenciones del gobierno en las siguientes áreas:

- la evaluación del alumnado;
- la formación de formadores a lo largo de todo el proceso;
- la política de recursos didácticos; y finalmente,
- el sistema de inspección escolar.

Para la recogida de datos acerca de las áreas arriba mencionadas hemos realizado 96 entrevistas en Sofía y hemos distribuido 201 cuestionarios por toda Bulgaria (véase capítulo 10 sobre el protocolo de investigación). Nuestra selección de informantes se hizo en función de tres grandes categorías:

- *la sociedad civil* incluyendo representantes de organizaciones no gubernamentales, asociaciones de padres y estudiantes de escuelas secundarias y de la Universidad;

- *los educadores* incluyendo los maestros de escuelas secundarias, los profesores universitarios y los formadores de maestros;
- *los administradores y gestores* incluyendo los responsables de la política educativa, los directores de las escuelas secundarias, los inspectores, y los dirigentes de las centrales sindicales de profesorado.

Las conclusiones de este análisis se presentan y se analizan en el undécimo capítulo de nuestro estudio, en el cual los distintos estamentos levantan su voz para ilustrar los puntos fuertes y débiles de la implementación de la reforma curricular de secundaria en Bulgaria.

Es obvio que la reforma curricular debería, en primer lugar, ir dirigida a los profesores de secundaria que van a tener que adoptar la metodología y los enfoques didácticos más idóneos para enseñar los nuevos contenidos. Partiendo de esa premisa, a través de nuestro estudio analizamos el impacto de los nuevos planes curriculares sobre la formación del profesorado, dando cuenta de las opiniones de los diferentes grupos de interés que inciden en el sistema educativo. La investigación abarca, por consiguiente, el conjunto de la problemática adoptando un triple enfoque que permite poner de manifiesto en el duodécimo capítulo:

- los diversos tipos de competencias docentes que se consideran importantes en el contexto cultural búlgaro para enseñar bajo los nuevos planes curriculares;
- el valor y credibilidad que tienen para nuestros informantes las competencias profesionales de los profesores Búlgaros de secundaria; y
- la percepción que tienen nuestros informantes en relación con el nivel de calidad del actual sistema de formación de formadores.

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Al término de la investigación, los datos de que hemos podido hacer acopio y de su análisis tanto respecto al marco legal y administrativo como de la opinión de los distintos actores expresada bien mediante entrevistas personalizadas bien mediante cuestionarios *ad hoc*, nos

han permitido fundamentar las siguientes conclusiones en relación con las cinco preguntas de investigación que se acaban de plantear.

1. La reforma curricular se estaba efectivamente llevando a cabo, dentro del marco de una reforma educativa más amplia, pero con significativos retrasos y sin tener todos los estamentos implicados en dicha reforma.
 - a. La reforma fue diseñada y decidida por el poder central y llevada a cabo por el Ministerio de Educación y Ciencia. El Banco Mundial ha sido la institución internacional que contribuyó significativamente a su planificación e implementación tanto con apoyo financiero como con apoyo técnico. Los datos recogidos a través de las 96 entrevistas realizadas con educadores, administradores y la sociedad civil búlgara, nos permiten deducir que el gobierno no comunicó adecuadamente a la sociedad búlgara los beneficios que podría aportar esta reforma. Por lo consiguiente, en la hora de implementar tanto la reforma curricular como reformas complementarias, por ejemplo la introducción de libros alternativos o la externalización de la evaluación del alumnado al final de la educación secundaria, se enfrentaron serios conflictos y resistencia sobretodo por la parte de la sociedad civil: los alumnos y sus padres.
 - b. La reforma curricular se retrasó bastante, ya que diversos intentos de eliminar la carga ideológica del contenido educativo se iniciaron en 1989 con la democratización del país, pero sólo diez años más tarde, en 1999, el gobierno adoptó una nueva ley: el Nivel de Educación, Mínimos de la Educación General y Ley de Currículo (MES, 1999g), bajo la cual se introdujo el nuevo marco curricular que luego se implementó progresivamente en todos los niveles de educación obligatoria. Además, se produjeron grandes retrasos en la implementación de reformas complementarias para apoyar el nuevo currículo, especialmente en las áreas de la evaluación del alumnado y de la formación del profesorado. Dichas reformas aún no se han implementado, ocho años después de la introducción del nuevo currículo. También, se han

observado retrasos en la producción de nuevos libros de texto basados en el nuevo currículo.

- c. Se introdujeron cambios en el sistema educativo sin ser apoyados por un marco legislativo que pudiera asegurar transparencia y apoyar a los maestros en la aplicación de las nuevas medidas. Los dos ejemplos más representativos de estas carencias se presentan a continuación. En 1999, se adopta un nuevo currículo nacional pero no se adoptan estándares nacionales para la evaluación del alumnado bajo el nuevo currículo. En 1993, se da la oportunidad a los maestros de secundaria de elegir entre varios libros. Pero los nuevos libros llegan a las escuelas en el último momento antes del inicio de nuevo curso académico, y sin instrucciones a los maestros sobre cómo elegir el libro más adecuado. Sólo seis años más tarde, en 1999/2000, el Ministerio de Educación y Ciencias adopta los Requisitos Nacionales para los Libros y Materiales de Enseñanza así como las Normas y Condiciones de Asesoramiento de Libros (Regla No 5 sobre Libros y Materiales de Enseñanza de 28 de Diciembre 2000, publicado en Gazette estatal No 4 de 12 de Enero, 2001). Dos años más tarde y por una enmienda de la Ley de la Educación Nacional, el número de los libros alternativos se limita a tres para poder regular el mercado y controlar el caos que se creó en las escuelas.
2. Esta reforma ha sido necesaria en Bulgaria para poder consolidar cambios radicales aportados por la democratización de la sociedad y el desarrollo de su economía, ya que siendo un estado en transición recientemente pasó a ser miembro oficial de la Unión Europea (Banco Mundial, 2000a). De las 96 entrevistas realizadas con diferentes estamentos y actores de la sociedad búlgara, podemos concluir que los informantes entienden la necesidad de una reforma educativa dentro del marco de cambios socioeconómicos surgidos a nivel nacional, así como por la necesidad de alinear su sistema con los de los países europeos occidentales. Sin embargo, las respuestas recibidas por los 201 informantes han demostrado que la reforma no ha respondido a las necesidades de los actores claves involucrados en el proceso: los profesores. Se constata que en su mayoría, ellos no están satisfechos con la

formación del profesorado para llevar a cabo dicha reforma. Los diferentes grupos de informantes creen que los profesores de secundaria no disponen de las competencias necesarias y adecuadas para llevar a cabo con éxito la reforma curricular. Ello es debido, según su opinión, tanto a la inadecuada formación inicial que reciben los profesores de secundaria, como a las escasas oportunidades disponibles de formación continua de alta calidad.

3. Los componentes de la reforma curricular suponen una convergencia con las reformas de los sistemas educativos de los países desarrollados que promueven currículos basados en competencias, diversificación y mayor flexibilidad en la organización y selección de las asignaturas, así como la introducción de nuevos conceptos y valores sociales en el contenido educativo.
 - a. Tanto en los países desarrollados de la OCDE como en los países Balcánicos y especialmente en Bulgaria, las asignaturas de *Historia* y *Geografía* en la enseñanza secundaria se han revisado para promover inclusión social y tolerancia. Especial importancia se da en este nivel educativo a la educación cívica difundiendo el concepto de ciudadano europeo a través tanto de las humanidades como de las ciencias sociales. Una amplia gama de idiomas extranjeros se ofrecen en los nuevos planes de estudios y su enseñanza está basada en el Marco Europeo Común de Referencia para el aprendizaje, la enseñanza y la evaluación de idiomas (Consejo de Europa, 2001a).
 - b. Por primera vez en la historia de la educación búlgara, se adoptan estándares nacionales de los contenidos de enseñanza basados en competencias (Estándares Nacionales de Educación publicados en Azbuki Newsletter, issue 47/1999), que los alumnos deberían desarrollar e adquirir a través del nuevo currículo. El nuevo currículo ya no es un mero listado de asignaturas con los temas obligatorios que deberían cubrir, sino que se estructura en ocho áreas bien definidas que ayudan a establecer conexiones entre materias relacionadas, incrementando así la flexibilidad tanto de los maestros como de los alumnos. Las escuelas por primera vez tienen derecho a adaptar el

currículo nacional a sus propias necesidades (School Based Curriculum) y los alumnos pueden elegir nuevas asignaturas o profundizar en las asignaturas que más les interesan.

- c. En 1993, se liberó el mercado de los libros. El libro deja de ser la Biblia del maestro y el mercado se abre dando soluciones alternativas. Por primera vez los profesores pueden elegir entre varios libros de texto el más adecuado para poder transmitir el nuevo contenido educativo. Esto da la posibilidad a los maestros de adaptar tanto sus métodos de enseñanza como los instrumentos que utilicen según las necesidades de sus alumnos.
4. La reforma educativa no sólo debería incidir en la adquisición de saberes o competencias, sino en la formación ética y ciudadana de los estudiantes. Para alcanzar este objetivo, es indispensable no sólo que se introduzca un currículo que promueva principios éticos y de ciudadanía, sino que la escuela funcione como una pequeña sociedad democrática ejemplar. En el caso búlgaro, los datos recogidos nos permiten dar fe de los siguientes puntos:
- a. Se observa que la mayoría de los informantes no perciben la escuela como una pequeña comunidad social donde los participantes deberían colaborar. Sólo dos de entre los siete grupos de informantes¹, los sindicatos de profesorado y las ONGs, valoran competencias en los profesores de secundaria que pertenecen al ámbito de la escuela. Sólo los sindicatos perciben la necesidad de cooperar con los padres, los maestros y varios otros agentes sociales para alcanzar los objetivos educativos de la escuela. De los resultados del nuestro estudio, se hace evidente que hay una clara tendencia a ver la problemática educativa como una actuación individual limitada dentro de las paredes del aula. A partir de las informaciones que ponen de manifiesto la poca importancia atribuida por los informantes a competencias

¹ Los siete grupos de informantes que contestaron a nuestro cuestionario son: los administradores, los miembros de ONGs, miembros de sindicatos del profesorado, los profesores de escuelas secundarias, estudiantes universitarios, profesores de universidad, e inspectores.

relacionadas con la socialización y colaboración, se puede deducir que la sociedad búlgara no está lo suficientemente sensibilizada sobre la urgencia de que los profesores como los alumnos deben adquirir competencias tanto sobre trabajo en grupo, cooperación, colaboración e intercambio de ideas que son necesarias hoy en día para cada ciudadano.

- b. Los administradores, los estudiantes y los profesores de Universidad no piensan que sea necesario que los maestros dispongan de competencias profesionales que les permitan actuar de manera crítica y ética y con responsabilidad mientras realizan sus responsabilidades. Es indudable que tanto los gestores que marcan las políticas como los profesores universitarios que forman los profesores de secundaria deberían ver esta necesidad para que se incluyan dichas competencias en los planes de preparación del profesorado. Es sabido que sólo si los profesores demuestran una personalidad ética y bien equilibrada, podrán los alumnos también desarrollar competencias parecidas que son necesarias para vivir y convivir en la sociedad moderna.
- c. Los alumnos que respondieron al cuestionario no creen que entre las funciones de los profesores debería estar la de asegurar la buena conducta de los alumnos en el aula y en la escuela. No sorprende que estudiantes adolescentes de secundaria manifiesten esta actitud de resistencia al papel del profesorado como controlador de la disciplina en los centros educativos. Por otra parte, mientras que entre los demás grupos hay unanimidad en cuanto a la necesidad de motivar a los alumnos para trabajar y convivir en el aula, sólo los profesores y los inspectores reconocen como importante la necesidad de comunicar a los alumnos las normas de buena conducta en la escuela y asegurar que adoptan un comportamiento social apropiado.
- d. Los estudiantes son el único grupo sensibilizado ante/por la integración social de los estudiantes con dificultades de aprendizaje o de comportamiento. Es curioso que entre los distintos informantes, los

estudiantes son los únicos que entienden lo importante que es para los maestros saber y poder trabajar con aulas diversificadas y heterogéneas evitando toda forma de discriminación y convirtiendo el aula en un ámbito apropiado y beneficioso para todos.

- e. Todos los informantes reconocen la necesidad e importancia de promover un comportamiento democrático en el aula dando a los estudiantes la atención y apoyo que les corresponde y permitiendo la existencia de distintas opiniones. Esto es un punto positivo en el caso búlgaro para que la reforma se pueda llevar a cabo con éxito.
 - f. Todos los informantes reconocen la necesidad e importancia de establecer una comunicación eficaz y apropiada entre los profesores, los alumnos y sus padres. Esto es un punto fuerte para la comunidad educativa búlgara para poder asegurar los principios y el espíritu democrático en las escuelas y facilitar la implementación de la reforma. El estudio ha demostrado por lo tanto que para algunos grupos como las ONGs, las centrales sindicales, los profesores universitarios, los estudiantes y los inspectores, esta necesidad de comunicación se limita a algunas tareas muy específicas. Además los administradores, los miembros de ONGs, las centrales sindicales del profesorado y los profesores universitarios dan poca importancia a la participación de los alumnos y los padres en la planificación del proceso de aprendizaje. Este dato es tanto más significativo que obviamente para que la reforma llegue a buen puerto todos los estamentos deben percatarse de los beneficios que puede aportar la comunicación y colaboración tanto con los alumnos como con sus padres para identificar necesidades e incrementar la relevancia del proceso educativo.
5. La implantación de la reforma en el momento actual permite augurar que habrá problemas en la continuación del proceso ya que hemos visto falta de motivación y sensibilidad acerca de la necesidad, entre otras, de colaborar y trabajar en equipo. El

análisis de los datos recogidos tanto mediante las entrevistas como mediante los cuestionarios nos permite identificar las siguientes áreas problemáticas:

- a. No existe un consenso generalizado en cuestiones muy básicas tales como la responsabilidad y la función del maestro. Ello podría acarrear problemas a la hora tanto de tomar como de aplicar decisiones. Por ejemplo, los distintos estamentos no conceden la misma importancia a las distintas competencias contempladas por la investigación. Tampoco coinciden en su valoración de las necesidades de formación del profesorado en las distintas áreas. Todo ello podría augurar problemas en la concepción y aplicación de nuevos programas de formación del profesorado.

- b. La motivación para el uso de nuevas tecnologías en el proceso pedagógico es muy escasa en Bulgaria. Los administradores, los profesores, los inspectores, los miembros de ONGs y los alumnos no creen que sea “directamente importante” el que los profesores posean competencias para poder introducir las nuevas tecnologías en la preparación y el desarrollo de actividades de enseñanza-aprendizaje. Sólo los profesores de Universidad y las centrales sindicales del profesorado han demostrado una cierta sensibilidad hacia las nuevas tecnologías pero tampoco ellos reconocen la necesidad de saber el potencial pedagógico de TIC. La falta de entendimiento hacia los beneficios que pueden aportar las nuevas tecnologías en el proceso educativo, puesta de manifiesto por nuestra investigación, puede considerarse como uno de los puntos más débiles de los actores Búlgaros involucrados en el sistema educativo. Esta falta de conocimientos y de motivación tanto por parte de los que deciden, como de los que educan y de los que reciben dicha educación puede dificultar la aplicación de medidas que se orientan hacia el uso de nuevas tecnologías en las escuelas y la modernización del sistema educativo. Es evidente que hay una necesidad urgente de (in)formar la sociedad búlgara sobre la utilidad de las nuevas tecnologías como instrumento pedagógico. Tomando conciencia de esta necesidad, el gobierno búlgaro, desde 2005, a través de la Estrategia Nacional para la Introducción de Tecnologías de

Información en Escuelas búlgaras (2005-2007), hizo un esfuerzo muy grande para equipar los profesores con habilidades básicas sobre el uso de Nuevas Tecnologías de la Información y Comunicación (NTIC) y la introducción de computadoras en el proceso de enseñanza (Banco Mundial, 2007a). En Mayo 2007, el Consejo de Ministros aprobaron un plan de acción actualizado para la implementación de dicha estrategia y actualmente, el Ministerio de Educación y Ciencias (MES) está preparando una segunda estrategia para Educación y NTIC (2008-2013).

- c. Ninguno de los informantes considera pertinente e indispensable la investigación-acción en la profesión del maestro como proceso para el desarrollo de sus propios conocimientos y competencias. Podría considerarse que esa carencia va a dificultar la modernización del sistema educativo búlgaro y su alineamiento con los estándares europeos. La Comisión Europea en su comunicación para el mejoramiento de la formación del profesorado, basada en los Principios Comunes Europeos para las Competencias y Cualificaciones del profesorado, subraya que el desarrollo profesional de los profesores implica que ellos realicen investigaciones académicas y sobre la didáctica en el aula e incorporen los resultados dentro del proceso de enseñanza (Comisión Europea, 2007).
- d. Ni los administradores, ni los profesores de secundaria o universitarios, ni los inspectores, y tampoco los alumnos consideran tan importantes las competencias relacionadas con la atención a la diversidad de los alumnos en el aula. Se podría deducir que los distintos estamentos no están suficientemente sensibilizados en el principio de solidaridad en la actuación educativa. Poder trabajar el profesorado con estudiantes que tienen necesidades especiales tanto como estudiantes de diferentes perfiles económicos y sociales y provenientes de distintos orígenes nacionales es indispensable a la hora de implementar reformas relacionadas con la integración de dichos alumnos en las escuelas generales públicas. Basta considerar el número significativo de minorías, como son los gitanos, y de

otros grupos desfavorecidos que viven hoy en día en Bulgaria para darse cuenta de que es vital formar la ciudadanía acerca de la importancia de ayudar y convivir con estas personas.

- e. Por lo que hemos visto en nuestro estudio, se podría deducir que, como en otros países europeos, el estatus profesional del profesorado no está ampliamente aceptado en Bulgaria. Especial énfasis debería darse en el incremento de la sensibilización hacia la profesionalización de los profesores búlgaros y el lado profesional de las responsabilidades de la profesión de enseñanza ya que esta área de competencias no está bien valorada por los distintos actores. Junto con esto, hay una clara necesidad a motivar los profesores de secundaria de participar en proyectos de desarrollo profesional y formación continua. De las respuestas recibidas en nuestros cuestionarios, se concluye que a ninguno de los grupos de informantes les parece una prioridad la formación continua para los profesores ya que no creen que ellos deberían involucrarse en un proyecto de perfeccionamiento. Esto es muy peligroso sobre todo a la hora que una reforma curricular y un gran cambio toman lugar en el sector educativo. La falta de entendimiento por parte del profesorado, de la necesidad de desarrollar sus propias competencias para poder enfrentar las nuevas necesidades derivadas de la reforma educativa puede convertirse en un gran obstáculo para el éxito de dicha reforma.
- f. La función del profesor como evaluador y las competencias que debería poseer para evaluar de manera objetiva la progresión del alumno en su aprendizaje y la adquisición de habilidades de sus estudiantes está bien aceptada por todos los estamentos excepto los estudiantes. Por una vez más, no sorprende que los estudiantes también muestren rechazo o resistencia al papel evaluador del profesorado.

Para que sea eficaz esta reforma de la enseñanza secundaria, es decir para contribuir positivamente a la formación de la personalidad, para la formación del futuro ciudadano y para la integración de los estudiantes en la vida laboral, se necesita por consiguiente la

implicación y sinergia de todos los actores concernidos y se debe sensibilizar a la sociedad búlgara sobre las áreas arriba mencionadas. En concreto, primero se debe informar a todos los actores concernidos sobre los beneficios de las nuevas tecnologías en la enseñanza, y segundo se debe fortalecer e incrementar la calidad y relevancia de la formación de profesorado, sobre todo en nuevas tecnologías y en la enseñanza enfocada a las necesidades especiales del alumnado. Todos los actores concernidos deberían percibir la escuela como una representación del mundo real para poder actuar en ella como tal. Especial atención debería darse por un lado al desarrollo de competencias tanto de los profesores como de los estudiantes hacia el trabajo en equipo y métodos interactivos de enseñanza, y por otro lado al entendimiento de conceptos relacionados con la tolerancia, la democracia, la colaboración y la solidaridad.

En el caso concreto de Bulgaria, las informaciones recogidas en la presente investigación y las conclusiones que se derivan pueden además contribuir a fundamentar los requisitos de formación exigidos al profesorado, esto es, el diseño de la estrategia de Formación del Profesorado y Desarrollo de su Carrera Professional; permitiendo así que los diferentes agentes involucrados tengan una información clara y precisa acerca de las competencias que se le suponen al profesorado de enseñanza secundaria.

Estas conclusiones de la investigación, que se discuten en la cuarta y última parte de este informe (capítulo 13), pueden contribuir, por una parte, a poner de manifiesto e identificar las prácticas más efectivas y eficaces en materia de políticas de educación secundaria, y por otra parte, a señalar y corregir los puntos débiles de dichas políticas y de sus estrategias de implementación.

La investigación llevada a cabo, puede asimismo ser de utilidad tanto para aportar información sobre el actual proceso de reformas de Bulgaria, como para orientar otros futuros procesos que se puedan dar en el resto de los países Balcánicos y del Este de Europa. Quizás pueda contribuir, por lo tanto, a que los encargados y responsables de la política educativa tengan instrumentos objetivos para detectar con mayor claridad algunos de los problemas que existen y si hubiera lugar, poder tomar las decisiones correctoras oportunas.

INTRODUCTION

“Changing education is like moving a cemetery. There are a lot of entrenched positions and you don’t get much help from the inmates”.

Mark Twain

At the beginning of the 21st century, education is not only a determinant factor for the formation of citizens and their complete realization as human beings, but also it is emerging as a strategic sector with key importance for the competitive global economic environment (new technology-based production, internationalized global markets, etc.). For this reason the future of each nation, regardless of its social and economic development, is largely determined by its ability to quickly adapt to changing conditions and become effectively involved in these global processes. That is why the educational policies for the smooth development and progress of the actual societies are very important.

These days, in the agendas of the educational policies both of the developed countries as well as those economically less developed, the principle objective consist in the universalization of the access in secondary education. This objective has special relevance since the education received in the secondary education will affect and enhance lifelong learning.

The soaring demand for access to high quality, relevant secondary education is forcing secondary school systems in most of the countries to react and adapt. Within this context, secondary education becomes both compulsory and increasingly universal in many countries around the world, and this is translated into increasingly complex challenges. Nowadays the greatest twin challenge consists in expanding access to secondary education while improving its quality and relevance according to the needs of the society.

It is also widely recognized that curriculum renewal is an important component of educational reforms oriented to quality improvement. Curriculum relevance is a condition

not only for improving the potential of the human capital of secondary education graduates but also for retaining youngsters in school. The irrelevance of the secondary education curriculum is actually one of the fundamental factors, which causes the widening gap between school and the youth culture; to the extent that school is not sufficiently attractive to youths and does not effectively address their needs.

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Most OECD countries began addressing issues of curricula review and reform since early 80s, while this process has been delayed in transitional countries of the Balkan region (such as Bulgaria, Romania, Albania, Croatia, FYROM, etc.) affected by radical political and social changes. To this respect, this study offers a rich panorama of recent secondary curriculum reforms that take place worldwide identifying some general trends in curriculum policies.

As it is known, the change of the education content is a long lasting and complex process for every country both while designing the reform as well as during its implementation. This is mainly because curriculum reform not only implies a change in curricular content, but also a set of accompanying reforms and interventions in the whole system: students' assessment, teachers' training, school inspection, provision of teaching materials, etc.

The lack of coordinating the reforms in these areas can cause a gap between theory and practice. This, in its turn, can lead to a mismatch among the curricula approved by the government, those implemented later on by the teachers and these achieved by the students. This discrepancy can decrease the potential positive impact of the curriculum reforms on education quality. For the Balkan countries with transitional economies which try to implement these changes under restricted financial and human resources, the challenges to implement successfully curriculum reforms are even bigger.

The particular situation of these countries and specifically the case of Bulgaria, the most economically developed transitional country in the Balkan region that entered in the European Union in January 2007, is being analyzed in depth.

In 1989, Bulgaria initiated a process of deep political and socio-economic reforms, which gave rise to citizens' expectations of rapid improvements in individual liberties and living conditions. The need for reforming secondary education began as early as democratization was established, however, the essential reforms have not been implemented until 2001/02.

In this sense, for examining the process of implementation, this study raises and answers the following questions:

1. How was the secondary education curriculum reform implemented in Bulgaria since the democratization and up to date?
2. How were the accompanying complementary reforms implemented to support the introduction of the new study programmes?
3. What is the impact of these reforms on the quality of secondary education today in Bulgaria as perceived in the eyes of different stakeholders and the civil society?
4. What does the change of the educational content and its organization involve for teachers' competences in secondary education?
5. Are teachers in secondary education institutions well prepared and equipped to face all these radical changes, which mark the history of the Bulgarian education system?

This study is an attempt to fill the lack of knowledge on the existing obstacles in Bulgaria to implement the secondary curriculum reform and to give light on how other accompanying reforms were implemented to support the introduction of the new curriculum. In this respect, it is being analyzed in depth the intervention of the government in the following areas:

- students' assessment;
- teachers' training;
- textbook policy; and finally,
- school inspection system.

It is obvious that curriculum reform first should consider teachers in secondary schools who need to adopt the most adequate teaching and learning methods to deliver the new content. Bearing this in mind, through our study, we analyze the impact of the new curriculum on the teaching profession based on the points of view of different groups of interest involved in

the educational system. The research addresses the whole spectrum of the subject adopting a triple focus, which allows us to put in relief:

- the expected competences that different actors in the education system consider important for secondary education teachers to have, so as to be able to teach under the new curriculum and within the Bulgarian cultural context;
- the belief of citizens on the Bulgarian secondary teachers' qualifications; and
- the opinion of the citizens on the quality of the current teachers' training system.

The findings of this study can contribute on one hand to identify good practices on secondary curriculum policies in Bulgaria, and on the other hand to learn from shortcomings of these policies and their implementation strategies.

Therefore, this study can be useful to complement the existing information on the currently ongoing educational reforms in Bulgaria, information that in turn can be used during the implementation of future reforms in the rest of the transitional countries in the Balkan region. It could give the possibility to decision-makers to have objective instruments to detect with major clarity some of the existing problems and if this is the case, to take the right corrective measures.

In the concrete case of Bulgaria, the findings derived from this study can support the design of the requirements for the teaching profession, this is the new Strategy for Teacher Training and Professional Development; enabling in this way the different stakeholders involved to have precise information on those competences considered important for teachers in secondary education.

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To better present the findings of this research, this work is structured in four main parts.

The first part, (Chapters 1-5) presents the methodological approach followed to carry out the present study and the global trends of secondary curriculum reforms in OECD and Balkan countries.

The first chapter presents the field of our investigation in that it deals with educational policy and administration of secondary education. Our focus on secondary education does not arise only from the need to minimize the field of study, but also and mainly because secondary education is crucial for the formation of citizens, by connecting different orientations and functioning as compulsory bridge between primary education, tertiary education and the labor market. Within secondary education, special attention is given to curriculum areas of social studies (*Geography, History, and Civic education*) and humanities (*National language and Literature and Foreign languages*), as these allow us to examine the neutralization of the political ideology more objectively and to efficiently analyze the modernization of their content.

The second chapter presents the hypothesis and objectives of the study and describes the different steps followed to undertake it and accomplish it.

The third chapter identifies the global trends on secondary curriculum policy among certain OECD and transitional Balkan countries and presents in a comparative basis our concluding remarks. In concrete, it presents the overall picture of changes in secondary education content, highlighting representative country examples.

The fourth chapter presents common trends on reorganizing and restructuring secondary education content, while the fifth chapter summarizes the conclusions.

The second part of this study (Chapters 6-9) is dedicated in the concrete case of Bulgaria, as the most economically developed transitional country of the Balkan region and one of the pioneer post-communistic countries of the region in reforming and modernizing its secondary education system. The main aim of this part is to present the institutional and legislative framework of the country. To do so, the sixth chapter presents the geopolitical and socioeconomic framework in Bulgaria; the seventh chapter presents a short historical review of the secondary education system under the communist part; the eighth chapter

describes the evolution of the Bulgarian education system, underlining the most significant changes in its secondary educational content since the change of the regime and up to date; while the ninth chapter summarizes our main observations.

The third part of our study comprises chapters 10-12 and is dedicated on the analysis of the implementation process of the curriculum reform, based on the views of the different actors involved in the Bulgarian education system. In particular, the tenth chapter describes the protocol of the investigation: the field of work, the elements under investigation, and the investigation tools used to carry out the research, and finally yet importantly the informants contacted, whose point of views constituted the basis for our analysis. The eleventh chapter addresses specifically the views of different stakeholders and the civil society on the implementation process of the curriculum reform and its interlinked ambits, illustrating both achievements and gaps. The twelfth chapter puts in the centre of the study the *teacher*, analyzing the impact of the curriculum reform on teachers' education and training provision.

The fourth and last part of the study discusses the findings of our investigation. In concrete, in chapter 13 we discuss the findings presented in previous chapters and we draw on the conclusions and contributions of this study in the field of secondary education policy and administration. Finally, the perspectives and directions for future research are being presented under the heading: Conclusions and Perspectives.

All bibliographical sources consulted during this study are presented in alphabetical order, while the appendixes present additional data on selected curricula in Bulgaria, as well as the detailed list of the informants and the statistical analysis of the collected data.

PART I. INTERNATIONAL TRENDS OF SECONDARY EDUCATION

CURRICULUM POLICY: METHODOLOGICAL APPROACH

The first part of our study defines, on one hand, the investigation field and the methodological approach used to carry it out, and it presents, on the other hand, the international context within which the secondary curriculum reform in Bulgaria took place. The historical evolution of secondary education and the present socio-economic and political characteristics of the global society explain the motivation behind curriculum reforms and their present political orientation. Data from a recent comparative study on the reasons led to curriculum reforms among different countries, illustrate the present spectrum of the driving force behind curriculum reforms. According to a preliminary study, we carried out on curriculum reforms in OECD and transitional Balkan countries (Psifidou, 2003b), the main current trends of secondary curriculum reforms in these two groups of countries can be categorized in two broad areas:

- a) reforming the *educational content* by either introducing new subject areas, excluding outdated ones, or/and by revising the content and aims of already existing subject areas; and
- b) reforming the *organization of the educational content* by rebalancing the time allocation to different subjects and curriculum areas, increasing flexibility and diversification, and allowing interdisciplinarity.

The following chapters are structured in accordance with these findings.

CHAPTER 1. INVESTIGATION FIELD

Before dealing with the substantial issues of this study, in order to ensure clarity, an attempt will be made to define our investigation field and to provide a working definition of all the terms used.

1.1 EDUCATION POLICY AND ADMINISTRATION

The present study is endorsed in the field of education policy and administration. By education policy, we mean the collection of rules, both stated and implicit, or the regularities in practice that determine the way the school system functions and govern the behavior of persons in schools. Policy on education can concern several areas and topics, such as the structure of the educational system; the duration of the different levels; the organization of the school year; the curricula and the standards; the students' assessment; the provision of textbooks; the school inspection; the teachers' training, etc. The education policy can be adopted at national level concerning the educational system of a specific country and/or at European level concerning common objectives of all the European member states.

There is a strong link between education and politics since it is impossible, in the long run, to teach insights or disseminate knowledge through textbooks which do not correspond to the general political context. The relationship between politics and education, however, is not one-sided. They influence each other. Education can supply new aims that will be propagated in schools and textbooks before they are implemented and fully realized on the political level.

“Education can lay the foundations for forming attitudes and opinions which are essential to policies that promote peace and mutual understanding. Through education, we can legitimately instill a sense of global responsibility

in the students' minds, although in reality pupils are confronted with violations of this principle almost every day” (UNESCO, 1999, p.37).

1.2 PUBLIC GENERAL SECONDARY EDUCATION

In the present study we focus on education policy development and administration of public general secondary education. We have selected to study the policy development of secondary education in particular because of its growing significance and attention paid nowadays. In fact, today, secondary education is a focus of increasing policy debate and analysis worldwide. This is mainly due to the realization from the part of different stakeholders and the civil society of the high importance of secondary education, arising from at least three main reasons (World Bank, 2005).

First, the universal achievement of primary education is interpreted to a soaring demand of the citizens for higher levels of education. Parents are looking for continuity in their children's formation while lifelong learning thinking is gaining progressively ground in human's mind.

Second, secondary education is the most crucial stage of the education system since it consists on one hand the transitional path between the primary education and the higher education, and on the other, it corresponds to the most crucial transitional period for the life of the youth. Since it is addressed to students between 14-18 years old, it marks the transition from childhood to youth life. This is the stage, which determines the degree to which young people will become active and productive citizens of their communities. It is the time when the character of young people is being formed and important values such as democracy, social inclusion, tolerance and ethics become or not, consolidated principles in students' minds. All these are determinant for the future social development of each nation.

“Secondary education is the highway between primary schooling, tertiary education and the labor market. Its ability to connect the different destinations and to take young people where they want to go in life is crucial.

Secondary education can act as a bottleneck, constricting the expansion of educational attainment and opportunity or it can open up pathways for students' advancement” (World Bank, 2005, p.xii).

Third, secondary education contributes to a great extent in the economic development of a country. New global developments and fast progresses in science and technology urge for more sophisticated labor force with new workplace skills and competences. Only primary education is not enough anymore to equip students with these skills and to prepare an internationally competitive workforce.

For all these reasons secondary education of good quality is seen as a crucial instrument for generating the opportunities and benefits of social and economic development, and therefore became the top priority in many governments' policy agendas around the world.

The multiple studies having already contacted on primary education, mainly under the Millennium Developmental Goals (MDG) of Education for All (EFA) and the undoubting stable governmental interest on tertiary education over the last years, convinced us of the need for more analytical work to sustain this “sudden” turned over of the global interest in the forgotten sector of secondary education.

Since this study is not addressed only to developed countries but also to countries with transitional economies, in order to conduct a comprehensive study, which concerns the many and does not limit to the few, we decided to focus on the public general secondary education, rather than the privately provided education. For reasons of limitation, we do not deal with both types. One of the fundamentals of public education is inclusion and usually is provided for free or against a small fee.

Public education may be provided by a national or regional government (province, state, territory, etc.), or it may be provided by a local (non-state) government. Where the state or a regional government provides public education, it is often referred to as "state education", a term that is rarely used when public education is provided by a local government.

Here we would like to clarify that the term "public education" is not synonymous with the term "publicly funded education". A public school (including ones run by school districts) may rely heavily on non-public funding (such as high fees or private donations) but still be considered public by virtue of public ownership and control.

Public education often involves the following²:

- a) Compulsory student attendance (until a certain age or standard is achieved);
- b) Teachers qualifications either by the government or by a teachers' organization;
- c) Assessment, curricula and standards provided by government.

Furthermore, our decision to analyze the policy development of general education rather than of vocational education and training (VET) is endorsed with solid arguments. The general education system is more homogeneously structured within a country and among different countries, something that facilitates comparison. In addition, the existence of a core curriculum, common to all students, until the end of upper general secondary education, eases the analysis of the evolution of its content and the identification of new curriculum developments.

In contrast, vocational education and training is quite a fragmented sector in almost all countries around the world. It is a huge and complex field comprising bits of education and bits of employment, with different actors involved in different parts of the system: at central, regional and local level; and as is to be expected there coexist numerous different policy priorities. Also, there are many different providers of VET, both public and private bodies; both educational and training institutions; and the industry. Its target group is also enormous, since it addresses virtually to the whole young and adult population, covering a great variety of settings: formal schools, enterprises and even e-learning. The curriculum and training models differ significantly from country to country but also from provider to provider within the same country, and therefore the identification of solid mega-trends in curriculum reform is almost impossible (National VET systems database of Cedefop).

² An exception is the United Kingdom, which provides an anomalous use of the term "public school". In England the term "public school" refers to elite of privately funded independent schools which had their origins in medieval schools funded by charity to provide education for the poor.

For the above mentioned reasons and under the ultimate goal to conduct a well focused and comprehensive analytical study taking in consideration all the actors involved, we decided to analyse the field of public general secondary education. For reasons of simplicity we do not always mention throughout our study “public general secondary education” but we simply refer to “secondary education”.

If we try to define secondary education in respect to its function, organization and duration, the following observations can be made. Secondary education stands at the middle of primary education and tertiary education and its policy development actually is being determined by its crucial position and role. Secondary education also represents the last stage of non-university education.

A broad definition of general secondary education includes lower and upper levels (ISCED³ levels 2 and 3). Lower secondary starts between ages 10 and 14 and in most countries is compulsory, and upper secondary starts between ages 14 and 16 and in most of the cases marks the beginning of post-compulsory education. Lower secondary schools are called sometimes “middle schools” or “junior secondary schools”, while upper secondary schools are also called “high schools”.

In some countries lower secondary education is grouped together with primary education, and is called basic and compulsory education (see table 1.1). Upper secondary education is usually divided into core studies, common and compulsory for all students (core curriculum) and specialized studies selected by students according to their preference (differentiated curriculum).

³ International Standard Classification of Education.

TABLE 1.1 ORGANIZATIONAL MODELS IN SECONDARY EDUCATION AROUND THE WORLD

Lower Secondary Structure	Example of Countries
1. Basic education is provided with no distinction between primary and lower secondary education.	Sweden, Finland, Denmark, Chile, Ecuador, Grenada, Colombia, Cambodia, China, Republic of Korea, Indonesia, Ghana, Angola, Botswana, South Africa, Burkina Faso, Comoros, Cyprus, Kazakhstan, Moldova, Slovakia, Ukraine, India, Nepal
2. Primary and lower secondary education are clearly separated. Students in lower secondary schools are not separated into specialized tracks.	France, Scotland, Italy, Greece, Portugal, Spain, England, Wales
3. Primary and lower secondary education are clearly separated. A significant proportion of lower secondary students are selected into differentiated tracks.	Germany, Austria, Luxemburg, Ireland, Belgium, Netherlands
Upper Secondary Structure	Example of Countries
1. General secondary education is provided to all students with no specialized tracks.	Brazil
2. General secondary education and specialized tracks are offered within the same institution.	Canada, England, Ireland, New Zealand, Spain, Sweden, USA
3. General secondary education and specialized tracks are offered in separate institutions.	Australia, France, Finland, Germany, Hungary, Italy, Japan, Republic of Korea, Netherlands, Singapore, Switzerland, Poland, Bulgaria, India

Source: World Bank 2005 adapted from Green, Wolf, and Leney, 1999; Le Métais, 2002

The duration of study, the average length of time it takes to progress from one educational level to the next and more particularly from lower to upper secondary education, varies across countries. It has been observed that in countries where upper secondary pathways are not sufficient flexible (combining both general and vocational formation), students tend to take longer to graduate in order to acquire qualifications in both types of education (World Bank, 2005, p.9).

In developed countries, a high proportion of the school-age population is currently enrolled in school for at least 12 years. Benavot's (2004) study of curriculum trends in 185 countries shows that the mean duration of secondary education around the world is 6.09 years, with significant variations (ranging from 4 to 9 years) between and within regions (see table 1.2).

These findings though should be interpreted carefully since in many countries, as we previously mentioned, lower secondary education is part of basic education for duration up to 9 years in total.

TABLE 1.2 DURATION OF SECONDARY EDUCATION BY REGION

Region	Min	Max	Mode
Africa	4	8	7
East Asia and the Pacific	4	8	6
Eastern Europe and Central Asia	5	9	7
European Union and United States	5	8	6
Latin America and the Caribbean	4	7	5
Middle East and North Africa	6	8	6
South Asia	5	8	5

Source: World Bank, 2005, p. 10 adapted from Benavot, 2004

1.3 SECONDARY EDUCATION CURRICULUM

Policy development and practice towards reforming and reshaping secondary education depends on the particular challenges faced by each country. Developing countries, such as sub-Saharan African countries, along with other low-income countries, face the greatest challenge of providing access to minimum quality of secondary education to their constantly growing population, while having to fight against the HIV-AIDS pandemic that devastates the teaching force and undermines the entire education system.

Middle income and transition countries, in particular those in Eastern Europe, Latin America and East Asia, have already achieved high enrollment levels in secondary education. Their main challenge is to improve quality, relevance, and efficiency to better align their education systems with those in open democracies and to respond to the rapidly changing demands of increasingly globalized economies.

High income developed countries have achieved even higher enrollment rates in secondary education and their policy priorities focus now more on decreasing drop-out rates by ensuring education relevance and school efficiency.

Since this study is meant to identify policy developments among middle-income transitional countries and high income developed countries, it is thought to analyze responses given in the biggest common challenge that these countries share: to expand access by improving the quality of education. Today, there is no educational policy on secondary education reform targeting quality improvements and relevance increases without including changes and innovations in the school “curriculum”.

As noticed by several writers, the term “curriculum” is elusive and epistemologically ill-defined (Lewy, 1991, p. 26-28). There is little agreement on where curriculum matters end and the rest of education begins. Not surprisingly, there are many definitions of curriculum. Rule (1973) identified 119 definitions of the term, and there have been several additions to this list since then.

The ambiguity of the term is intensified by the fact that in most European languages there is no equivalent to the English “curriculum”. In French there is the term “*programme scolaire*”, in German “*Lehrplan*”, and in Russian “*soderzhanie obrazovaniya*”. These terms tend to correspond to the English “syllabus”. A Russian scholar questioning the meaning of the term curriculum said that he was unable to see exactly what English-speaking scholars understood by the word, and he urged them to define it as the theory of programmes of instruction (Muckle, 1988). This narrow definition is adopted by several American experts too. Good for example, defines curriculum as:

“a general overall plan of the content, or specific materials of instruction that the school should offer the student by way of qualifying him for graduation or certification or for entrance into a professional or vocational field” (Good, 1973, 3rd edition, p.157).

Taba’s (1962) definition of curriculum is “*a plan for learning*” (p.9). This is a broader than Good’s definition: “*plan for learning*” means more than “*a plan of content*” inasmuch as it must comprise instructional materials, as well as the outline of the content units.

Nevertheless, both of these definitions refer to physical objects such as documents, books and instructional material, and thus foster an undesirable dualism. As indicated by Portelli

(1987), the emphasis on what should be taught tends to neglect the learner. From the 1930s onwards, the curriculum has often been defined in terms of experience in order to eliminate this dualism. The Tyler-rational regards “*learning experiences*” as a crucial element of the curriculum (Tyler, 1950). Macdonald (1986, p.207) stresses “*learning experiences*” saying that curriculum is not the course to be run, but the course that was run. The tendency to define curriculum as an experience, and not merely as a plan, arose not only to avoid the undesirable dualism between a written document and what is going on in the school, but also in response to the growing feeling that most of the products of the curriculum development efforts of the 1960s and 1970s were not put into practice.

Although there is no generally agreed upon definition of curriculum, for the majority of authors and experts, the curriculum defines: (i) why; (ii) what; (iii) when; (iv) where; (v) how; and (vi) with whom, the learning is to take place. In doing so it defines: the foundations and contents of education; their sequencing in relation to the amount of time available for the learning experiences; the characteristics of the teaching institutions; the characteristics of the learning experiences, in particular from the point of view of methods to be used; the resources for learning and teaching, such as textbooks and new technologies; evaluation; and teachers profiles.

When the concept of curriculum was still young, it was considered to be the product of a technical process. In other words, it was seen as a document prepared by experts and dependent on the state of the art of disciplinary and pedagogical knowledge.

In recent decades, the term curriculum has become increasingly used to refer to the existing contract between society, the State and educational professionals with regard to the educational experiences that learners should and in fact do undergo during a certain phase of their lives. The distinctiveness of different (often national) definitions is indicative of the different types of strategies, bargaining, and negotiation that infuse education policy dialogue and result in variations in curriculum particular to each society at a given time.

Moreover, just like the societies they reflect, curricula are not static, fixed entities. Indeed, the curriculum relates to the connections between the goals of education and everyday life in learning institutions, schools, colleges and universities. It defines what counts as valid

knowledge. With regard to the material expression of curricula in a narrow sense, i.e. the official curriculum or documents adopted by the educational authorities, these texts are increasingly flexible and open to teachers' interpretations. One of the results of this flexibility has been that the notion of curriculum as a product has become more closely linked with the idea of curriculum as a process, embodying on the one hand, a technical or professional dimension, and, on the other, a cultural and socio-political dimension. As the embodiment of processes that include a variety of products, it is perhaps clearer to begin referring to the term curriculum as "*curriculum development*", thereby encompassing a whole range of processes from vision to action, dynamically unfolding throughout societal, political, psychological, and cultural plans. We are now observing interesting and complex relationships between curricular documents, a number of curriculum development processes (including decision-making, technical elaboration and practice), and the various educational, cultural and social processes with which the curriculum interacts (IBE, 2003b).

In our study, when we refer to curriculum reform, we refer to the formal curriculum which based on a prescribed set of educational outcomes and goals it includes what is learned and what is taught (content); how is delivered (teaching / learning methods); how it is assessed (exams for example) and the resources used (e.g. books used to support teaching and learning). There is also the informal or hidden curriculum: the unplanned learning that occurs in classrooms, in the school compound or when the students interact together with or without the teacher present. This informal curriculum is important as it can be used to reinforce the formal learning. Curriculum reforms however initiated by governments address the formal curriculum.

The weight given in our study is on the first component of the curriculum, the content. The content is what teachers teach and what students are expected to learn, that is to know, understand or be able to do. It includes facts, concepts and skills that students will acquire within their learning environment. Sometimes the authority of the school or teachers are able to select the content to suit the students' needs, this is the so-called school based curriculum development (SBCD). Sometimes it is exclusively the Ministry of education that has prescribed the content of the curriculum, this is the case of countries with a national curriculum and national curriculum standards; and sometimes it is a combination of school

and Ministry, countries with a national framework for curriculum which allows space for school based curriculum development.

1.4 SOCIAL SCIENCES AND HUMANITIES

While this study begins by presenting general trends in secondary curricula reforms in all the subjects covered under secondary schooling, special attention is given to curriculum areas of **social studies** and **humanities**. We chose to examine in depth these particular curriculum areas because of their crucial importance nowadays in transmitting values and principles and in formatting pupils' personality. Of course, these are not the only curriculum areas having this mission, but they allow us to examine more easily the evolution of their content during the time and the inclusion of new values and principles. This is because their content is interdependent and affected by sociopolitical and economic changes; in contrast of the content of natural sciences and mathematics that is completely determinant from the evolution of the specific science.

On the one hand, the **social sciences** are a group of academic disciplines that study the human aspects of the world. They diverge from the arts and humanities in that the social sciences emphasize the use of the scientific method and rigorous standards of evidence in the study of humanity, including quantitative and qualitative methods. The social sciences, in studying both inter-subjective and objective or structural aspects of society, are sometime referred to as "soft sciences". This is in contrast to "hard sciences", which may focus exclusively on objective aspects of nature.

Social sciences as subjects in secondary schooling usually include the following subjects: *Anthropology, Geography, History, Civic education, Sociology and Economics*⁴.

⁴ The definition of all terms is based on the Oxford Advanced Learner's Dictionary, seventh edition.

Anthropology (from the Greek word “άνθρωπος”, “human” or “person”) consists of the study of humanity. It is holistic in two senses: it is concerned with all humans at all times and with all dimensions of humanity. A primary trait that traditionally distinguished anthropology from other humanistic disciplines is an emphasis on cultural relativity, in-depth examination of context and cross-cultural comparisons.

Geography is the study of the Earth and its features and of the distribution of life on the earth, including human life and the effects of human activity. Geography research addresses both the questions of where, as well as why phenomena occur in particular places. The word comes from the Greek words “γη” or “γαία”, both meaning "Earth", and “γράφειν” meaning "to describe" or "to write".

Since, place, matters for everything, from economics and health, to climate, plants and animals, geography is highly interdisciplinary. Geography draws upon and contributes to numerous other knowledge disciplines. Geography is broadly divided into human geography and physical geography, with subfields of geography including economic geography, political geography, urban geography, biogeography, geomorphology, coastal geography, and others.

History is information about the past. When used as the name of a field of study, *History* refers to the study and interpretation of the record of humans, families, and societies. Knowledge of history is often said to encompass both knowledge of past events and historical thinking skills.

Traditionally, the study of *History* has been considered a part of the humanities. However, in modern academia, *History* is increasingly classified as a social science, especially when chronology is the focus.

Civic education or **Civics** is the science of comparative government and means of administering public trusts - the theory of governance as applied to state institutions. It is usually considered a branch of applied ethics and is certainly part of politics.

Within any given political tradition or ethical tradition, *Civics* refers to education in the obligations and the rights of the citizen under that tradition. When these change, so often does the definition of civics. In secondary schooling in some cases, *Civics* does not stand alone as separated subject but usually it is included within other curricular subjects such as *History*. Its principle aim is to equip students with the necessary knowledge and skills to become active citizens in their societies.

Sociology is the study of society and human social action, and includes the examination of the origins, institutions, organization, and development of human life. The meaning of the word comes from the suffix "-ology" which means "study of" and the stem "soci-" which refers to society. It is a social science involving the study of the social lives of people, groups, and societies, sometimes defined as the study of social interactions. It is a relatively new academic discipline, which evolved in the early 19th century. It usually concerns itself with the social rules and processes that bind and separate people not only as individuals, but as members of associations, groups, and institutions. Sociology is interested in our behavior as social beings; thus, the sociological field of interest ranges from the analysis of short contacts between anonymous individuals on the street to the study of global social processes.

Economics (from the Greek “*οἶκος*” “family, household, estate”, and “*νόμος*”, “custom, law”, hence “household management” and “management of the state”) is a social science that typically studies the production, distribution, and consumption of goods and services. Since the early part of the 20th century, economics has focused largely on measurable variables, and employed both theoretical models and empirical analysis. Economic logic is increasingly applied to any problem that involves choice under scarcity or determining economic value, such as politics, religion, psychology, history and dating.

The study of *Economics* in schools obviously resulted from the increased importance of economics and finance in our days. The 21st century was fairly enough nominated a knowledge economy and therefore the main principle of economic theories is basic knowledge that students need to acquire in earlier ages. Therefore, *Economics* as a school

subject, from being exclusively studied in higher education, is increasingly forming part of the compulsory curriculum in secondary schools.

The subject is broadly divided into two main branches: microeconomics, which deals with individual agents, such as households and businesses, and macroeconomics, which considers the economy as a whole. An alternate division of the subject distinguishes positive economics, which tries objectively to predict and explain economic phenomena, from normative economics, which recommends one choice over another - such recommendations often involve subjective value judgments.

On the other hand, the **humanities** are a group of academic subjects united by a commitment to studying aspects of the human condition and a qualitative approach that generally prevents a single paradigm from coming to define any discipline. The humanities are usually distinguished from the social sciences and the natural sciences and in secondary schooling include subjects such as the *Classics, Languages, Literature and Philosophy*⁵.

Classics, particularly within the Western university tradition, when used as a singular noun, means the study of the language, literature, history, art, and other aspects of Greek and Roman culture during the time frame known as classical antiquity. As a plural noun "classics" can refer to texts written in the ancient Mediterranean world. The study of classics under the form of *Greek* and *Latin* is a primary subject for the humanities included in many secondary schools in Europe and beyond.

Languages in secondary schooling include always the teaching of the national language and one or two different modern foreign languages. In many cases, regional languages and minority languages are also offered in the school curriculum. Language teaching includes the learning of the grammar, syntaxes and morphosyntaxes, as well as the phonological and phonetic systems of a particular language, having as ultimate goal the oral and written proficiency communication of the learners.

⁵ The definition of all terms is based on the Oxford Advanced Learner's Dictionary, seventh edition.

Literature is literally “acquaintance with letters” as in the first sense given in the Oxford English Dictionary (from the Latin “*littera*” meaning “an individual written character: letter”). The term has generally come to identify a collection of texts, which in Western culture are mainly prose, both fiction and non-fiction, drama and poetry. In much, if not all of the world, texts can be oral as well, and include such genres as epic, legend, myth, ballad, other forms of oral poetry, and the folktale. Literature is being studied usually throughout the education system. In secondary education can be found as a combined subject with national language or as a separate subject.

Philosophy is a field of study that includes diverse subfields such as aesthetics, epistemology, ethics, logic, and metaphysics, in which people ask questions such as whether God exists, whether knowledge is possible, and what makes actions right or wrong. The fundamental method of philosophy is the use of reasoning to evaluate arguments concerning these questions. However, the exact scope and methodology of philosophy is not rigid. What counts as philosophy is itself debated, and it varies across philosophical traditions.

The term philosophy comes from the Greek word “*Φιλοσοφία*”, which means “love of wisdom”. The term is notoriously difficult to define because of the diverse range of ideas that have been labeled as a philosophy. The Penguin Dictionary of Philosophy defines it as the study of “the most fundamental and general concepts and principles involved in thought, action, and reality”. The Penguin Encyclopedia says that philosophy differs from science in that philosophy's questions cannot be answered empirically, and from religion in that philosophy allows no place for faith or revelation. However, these points are called into question by the Oxford Dictionary of Philosophy, which states: “*the late 20th-century prefers to see philosophical reflection as continuous with the best practice of any field of intellectual enquiry*”. Indeed, many of the speculations of early philosophers in the field of natural philosophy eventually formed the basis for modern scientific explanations on a variety of subjects. Informally, a “philosophy” may refer to a general worldview or to a specific ethic or belief.

In our study, from all the social science subjects and these of humanities, we chose to examine the curriculum reforms and the learning content evolution of *Geography*, *History*

and *Civic education* –among social studies- and *National language and literature* and *Foreign languages* –among the humanities. We chose these particular subjects because of allowing us to neutralize the information provided in these curricula and textbooks from political ideology, stereotypes and nationalism. In other words, they permit us to examine more easily the degree to which there have been influenced by sociopolitical changes within a country or by global phenomena.

1.5 GEOGRAPHICAL COVERAGE OF THE STUDY

The present study is divided geographically into two main parts. The first part covers a comparative study of trends on secondary curriculum development in OECD countries and in the countries with transitional economies of the Balkan region.

The OECD groups 30 member countries: *Australia, Austria, Belgium, Canada, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Japan, Korea, Luxembourg, Mexico, the Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Spain, Sweden, Switzerland, Turkey, the United Kingdom* and the *United States*.

Balkan countries with transitional economies include: *Albania, Bosnia & Herzegovina, Bulgaria, Croatia, Former Yugoslav Republic of Macedonia (FYROM), Romania, Serbia & Montenegro (formerly Yugoslavia)*.

We chose to study these two groups of countries because they cover virtually all the continents and the examination of their curricula reforms can give an overall idea of what is happening in different parts of the world in both high and middle income economies.

Our special interest in Balkan region results from the significant importance it has in the stability of the European Union but also because of the interest, that presents its educational systems and their content development and transformation after the democratization of their regimes. In these post-communist countries, the particular curriculum areas that we chose to

study are those that during the communist regime used to be the most ideological overloaded. Now they should consolidate in students' minds the principles of democratization and should help them to acquire a multicultural perspective and life skills to learn to live together.

We often refer also to all the EU member states, including information in this way on some Baltic countries that do not belong to any of the above-mentioned groups.

The second main part of the study presents the case study of Bulgaria (България). Bulgaria is a country in southeastern Europe having a crucial location between Asia and Europe. It borders the Black Sea to the east, Greece and Turkey to the south, Serbia and Montenegro and the Former Yugoslav Republic of Macedonia to the west, and Romania to the north along the river Danube.

Bulgaria has a rich history and a breadth of culture and tradition. Beginning in 1989, Bulgaria passed through a time of political, social, and economic transition that changed many of its basic institutions and subjected society to stresses unknown in the forty-five years of totalitarian communist rule. Although Bulgaria was one of the most closed communist societies until 1989, subsequent relaxation of tensions and restrictions has made available an increasing amount of reliable information on educational issues. However, analytical work on secondary curriculum reform and its implementation is limited and thus our interest and motivation to complement the existing gap on information resources.

CHAPTER 2. METHODOLOGICAL APPROACH

The following two chapters present the research questions and objectives of the study and describe in general lines the methodological approach followed to carry it out. This involved both the analysis of sociopolitical and administrative documents, as well as the completion of a field study based on in-person interviews and questionnaires administered across Bulgaria. More detailed information on the methodology used can be also found in Chapter 10.

2.1 RESEARCH QUESTIONS AND OBJECTIVES OF THE STUDY

For analyzing the process of curriculum reform in Bulgaria, it is necessary to examine the following three main areas:

1. **The educational content and its organization.** It is expected that a foreseen curriculum reform will change on the one hand, the content delivered to students (by increasing its relevance, including new elements, eliminating outdated topics, etc.) and on the other, will alternate the organization of the content (by creating broader curriculum areas, improving the linkage among individual subjects) as well as the specific time allocated to each curriculum subject.
2. **The competences required for the teachers to apply the new curriculum.** It is expected that teachers will need to possess adequate teaching competences and specific subject knowledge to be able to work successfully with their students the new educational content. The emerging specific competences required will allow us to see up to what extent there has been an essential change in the educational content and its teaching/learning practice. This in its turn will permit us to evaluate the effects of the curriculum reform on the global educational process in the country.
3. **The attitude and the opinion of the different stakeholders and actors involved in the educational process.** The different stakeholders and the civil society will take a certain position on the curriculum reform, which will allow us to measure the degree of their satisfaction with the implicit changes of the reform and the potential success of this reform.

Obviously, the significance of the change in the new curricula, the valuation of the evolution of the new competences required for teachers to teach under the new curriculum and finally, the valuation of the reactions of the different actors involved in the educational system, will demonstrate whether or not the curriculum reform has modified profoundly the educational process and the educational policy in Bulgaria.

The analysis of these three areas should allow us to draw conclusions on and reply to the questions of our investigation concerning:

1. whether the curriculum reform was being actually implemented and up to what extend;
2. if this reform responds to the expectations and needs of the Bulgarian society and particularly of the actors concerned;
3. if the curriculum reform in Bulgaria leads to a greater degree of alignment and convergence with the educational systems in the OECD countries;
4. if the educational reform not only facilitates the acquisition of knowledge and competences, but also the ethic and citizenship formation of students;
5. if in the implementation process of the curriculum reform exist obstacles and problems which could condition in a negative way the implementation of future reforms in the sector.

To better contextualize and understand the educational policy of Bulgaria in terms of secondary curriculum change, we will examine the broader international context on curriculum reforms in certain OECD countries and transitional countries in the Balkan region.

2.2 DEVELOPMENT OF THE RESEARCH STUDY

The present research was hosted by the World Bank from May 2003 to July 2005 due to its linkage with a broader study carried out by this International Organization on secondary education policy around the world. This World Bank policy study is exploring the key issues facing secondary education in the 21st century. Based on surveys of education specialists around the world, a book was published: *“Expanding opportunities and building competencies for young people: a new agenda for secondary education”* (World Bank, 2005) to put forth policy alternatives and options to assist policy-makers in developing countries and transition economies as they expand, reform, and transform their secondary education systems for a brighter future.

Together with the technical support provided by the World Bank, and particularly the Human Development Network, the complete present study was fully financed by the Greek Trust Fund. This is awarded by the Greek government to experts of Greek nationality working at the World Bank on analytical studies for specific transitional Balkan countries⁶ and on particular sectors, among them, this of education. Thanks to the World Bank H.Q. as well as the regional offices in Bulgaria and Romania, we were able to analyze literature and politico-administrative information, as well as information collected during our field study through individual in-person interviews and structured questionnaires.

A broad literature review took place at the beginning of this study (from 2002-04) analyzing qualitative and quantitative data from the most relevant educational sources. UNESCO⁷, OECD⁸, the World Bank, Eurydice⁹, Eurostat¹⁰, Edstats¹¹ and other international organizations, networks and institutions dealing with educational issues in national and international basis, were among our most consulted bibliographical sources and references. Thanks to this desk research, we were in a position to identify mega-trends on secondary curriculum reforms in certain OECD and Balkan countries. This enabled us to contextualize the findings of the case study, since, it allowed us to better understand the international

⁶ The countries covered under the Greek Trust Fund are: Albania, Bulgaria, FYROM, Romania, Serbia and Montenegro

⁷ United Nations Educational Scientific and Cultural Organization. www.unesco.org

⁸ Organization for Economic Co-operation and Development www.oecd.org

⁹ The information network on education in Europe www.eurydice.org

¹⁰ Statistical Office of the European Communities <http://epp.eurostat.ec.europa.eu/>

¹¹ The World Bank's comprehensive Database of education statistics <http://www1.worldbank.org/education/edstats/>

framework of secondary curriculum reforms, within which, the secondary curriculum reform is taking place in Bulgaria.

As member of the secondary education team in the World Bank H.Q. in Washington DC, I had the opportunity to grant this literature review with two study missions in Bulgaria at the end of 2003 and 2004, to facilitate a more analytical work on the case of Bulgaria. In total, 92 interviews were held in-person with different stakeholders, other interferes in the educational system as well as the civil society (see chapter 10.4.1). These semi-structured interviews (see chapter 10.3.1 and Annex 20 for the complete questionnaire of the interviews) were oriented to gather opinions on the design and implementation of the curriculum reform as well as the accompanying curriculum reforms including the teachers' training system; the students' evaluation and examination practice; the textbook policy; and the inspection system (see Chapter 11). Update information on new developments was gathered in February 2007 through 4 in-person interviews with Bulgarian Ministry officials during a familiarization workshop for the new member states and candidate countries which was organized by Cedefop (European Centre for the Development of Vocational Training¹²) and took place in Bucharest on the 13th-14th of February 2007.

Apart of the information collected through the 96 individual interviews that took place in total, we have also examined several politico-administrative and legislative documents, encountered in the Ministry of Education and Science in Sofia and translated into English for the purposes of the present study.

A structured questionnaire consisted of a list of competences and a set of open-ended questions (see chapter 10.3.2 and Annex 21a,b) was also disseminated broadly across Bulgaria through the network of Paideia Foundation¹³ in Sofia to the following entities: Ministry of Education and Science (MES), teachers' unions, universities, in-service teachers' training institutes, secondary schools, inspectorates and Non Governmental Organizations (NGOs) (see chapters 10.1.3 and 10.4.2).

¹² Cedefop's homepages www.cedefop.europa.eu and www.trainingvillage.gr

¹³ Paideia Foundation is a non-governmental organizations in public interest placed in Sofia, supporting the modernization of the Bulgarian education system (see chapter 10.1.3) www.paideiafoundation.org

The questionnaire was oriented towards three topics:

- the expected competences required for Bulgarian teachers to teach under the new curriculum;
- the opinion of citizens on the current professional qualifications of Bulgarian secondary teachers; and
- the citizens' points of view on the level of quality of the current teachers' training system.

In order to carry out the study and ensure high accuracy of the information collected, all research instruments were translated into Bulgarian. Accordingly, all in-person interviews were assisted by a professional interpreter, giving in this way the opportunity to the interviewees to express their opinion in their native language. Furthermore, many key documents of national legislation and of strategic character were translated into English.

More detailed information can be found later (see chapter 10) on the field work of the research, the elements under investigation, the investigation tools used to carry out this study and the selection of informants.

CHAPTER 3. GLOBAL TRENDS IN SECONDARY EDUCATION CURRICULUM REFORM

Traditionally curriculum was conceived of as the totality of skills and topics to be taught in schools. Quite frequently, the curriculum was determined by age-old traditions, and remained unchanged for long periods of time. Consequently, no need was felt to produce a formal curriculum document, and in the cases in which such a document was produced, it contained a concise list of skills and topics. There were occasionally accompanied by some explanations about their importance, the sequence of their teaching and the time to be allocated to their teaching. Documents of this type have been usually referred to as syllabuses. Since syllabuses were quite stable over several years, and were only altered after long periods of time, educational systems did not need to employ curriculum officials on a permanent basis. The revision of school syllabuses was usually carried out by ad hoc committees.

Since 1950s large-scale curriculum reforms have been introduced in most educational systems across the world. The first and most notable among them was the curriculum reform of the 1950s in the United States of America. Other educational systems followed later and initiated educational reforms of a similar type.

The New Curriculum Movement of the late 1950s brought about changes in the conceptual definition of curriculum, the specification of physical objects through which it was embodied and the way it became produced. Adopting the idea of the “*structure of discipline*”, it employed academic and discipline-oriented criteria for determining what should be taught in schools. The scope of objects considered to constitute the physical embodiment of the curriculum became broadened to contain, in addition to the syllabus, textbooks, tests and so on. To cope with the complex task of preparing a broad variety of curriculum objects, to control their quality, to adapt them to the changing conditions of the environment and the state-of-the-art of disciplines taught in schools, large-scale curriculum

development institutions were established across the world by central educational authorities and/or other, publicly supported foundations (Lewy, 1991, p.13).

These institutions had hardly succeeded in producing the first set of curricula for all grade levels and subjects taught in schools, when arguments were brought up against such a “top-down” curriculum development approach, claiming that schools and teachers should play an active role in developing their own curricula (Connelly, 1972). In the 1980s a strong counter-movement opposing views of the New Curriculum Movement emerged. It became known as the School-Based Curriculum Development (SBCD) movement (Skilbeck, 1984).

The name School-Based Curriculum Development conveyed principally that the shortcomings of the New Curriculum Movement were to be remedied by having curriculum-related decisions made at school level. The broader definition of SBCD implied not only full autonomy for the school to decide what to teach, but also a commitment on its behalf to prepare instructional materials for the courses offered, with a minimal reliance on available textbooks. The narrowest definition of SBCD would stipulate that the central educational authorities delegate some freedom to, or bestow some autonomy upon the local or the school authorities on determining a certain part of the school programme (Lewy, 1991, p. 34). However, the operational implications of this movement were not stated with a sufficient level of clarity, and confusion was created among educational planners.

These two partners of curriculum development, the centralized and the school-based approaches are not innovations of the 21st century. Both of them have existed for a long time. If we examine the two hundred history of these conflicting partners of curriculum development, we can note that no single pattern was fully dominant in any country but both practices coexisted in one or another way. It is to be questioned therefore what motivated different countries around the world since 50s to proceed in massive curriculum reforms.

This topic is tackled in the third chapter of our study which presents the motivation behind curriculum reform in a global scale, bringing abroad specific examples of certain developed and transitional countries. It also identifies some global trends of changing secondary education content and its organization in different school systems around the world.

3.1 MOTIVATION FOR CURRICULUM REFORM

Curriculum reforms around the world have been taken place throughout history, however what makes new curriculum reforms different from those in the past is the nature and scope of change. They are more integrated, holistic and dependent on wider national and international factors, including new values and principles.

“Although, in the past, the main objective was to invent and promote national homogeneity¹⁴: one land, one religion, one language, one history, nowadays, is to promote diversity- multi-ethnicity or multiculturalism- in the sense of respecting and preserving the one’s cultural and one’s own language” (Braslavsky, 2003a, p 234) .

Contemporary curriculum reforms are more holistic, systematic and contextual than before. Their ultimate goal is to improve the quality and relevance of the educational system. Although economic goals, such as increases in national output, creation of new jobs, preservation of employment, and reinforcement of competitiveness, still occupy the top positions on educational reform agendas throughout OECD countries, these goals are becoming more and more balanced with the other aims of education, such as social cohesion and citizens’ empowerment (UNESCO/IBE, 2003a).

A study on the reasons for undertaking curriculum reforms in all over the world (Rosenmund, 2003, p. 9-11), based on national reports of more than 100 countries- submitted to IBE in view of the 46th International Conference of Education in 2001- classify them into four broad levels/categories:

- I. The first category refers to *Education institutional level*. This means the features that the education system itself presents. This category includes the following variables:
 1. *Shortcomings of the existing curriculum*: when there are some inadequate characteristics of the curriculum itself that urge for a change. These

¹⁴ In the XIX century, representative is the case of Italy and Germany, which did not have a political status, and there were looking to create a political unification through education and the different cultural components.

shortcomings can arise in terms of an outdated educational content or an inadequate structure and organization of the content within the curriculum framework.

2. *Incongruence between curriculum and learners needs or teaching approaches*: when there is a mismatch between the existing curriculum practice and the new teaching and learning needs of students. For example, when the structure and content of the curriculum does not give the opportunity and freedom to teachers to cope with diversified classrooms in terms of students ability, nationality, etc., or when the curriculum does not anticipate the use of new technological developments for the teaching and learning process.
3. *Incongruence of curriculum and education system*: when the educational content and its organization does not fit within the overall aim and structure of the education system or when the opposite happens. For example, when the educational system has been modernized to increase the school autonomy, decentralize the decision-making and school administration but the curriculum remains rigid without allowing flexibility and adaptability to specific school and students' needs; or, when the opposite happens.
4. *Low performance of school system*: when because of the above-mentioned reasons and/or others, the school system does not work adequately and a curriculum reform is foreseen targeted to increase the quality and relevance of the whole education system.

II. The second category of motives for curriculum reform refers to *societal level*. This category includes all the reasons arising from the relationship of interdependence that exist between the educational content and the characteristics of the country itself. In this category the following variables are included:

1. *Incongruence between educational content and social reality*: when the educational content is not relevant anymore to the current social reality of the particular country. This is a more general variable, which includes the more specific ones which follow.

2. *Perception of new social problems*: when the education content needs to be updated to respond to newly emerged social problems faced by the particular country. Some examples of these new social problems are the spread of AIDS, the increase of unemployment, the multiplication of divorces, etc.
3. *Society's adaptation to social transformation*: when is being created the need for content adjustment to a radical social change the country is witnessing. For example, when democratization is being established to a previously communist country and the social values and principles radically change.
4. *Support of social development*: when curriculum reform becomes part of the developmental goals the specific country seeks to reach. The educational content delivered to students then becomes the main instrument to transmit new values and principles, which will contribute to the social prosperity of a country, such as the enhancement of European citizenship, social inclusion, learning to live together, lifelong learning, etc.

III. The third category refers to *World society level*. This means the relationship between the country and the global society. This category includes the following variables:

1. *Globalization-Internationalization*: when these global phenomena have a direct impact on the educational content and its organization within the national education systems. For example, when new curriculum subjects and concepts become economically meaningful and seek to occupy a position in the school curriculum.
2. *Adaptation to global development*: when the country feels the need to adapt to global developments. This is for example when good quality of education is being seen as a crucial tool for generating the opportunities and benefits for global social and economic development.
3. *Exchange with / integration in the international system*: when the country wants to be comparable and competitive in the broader international system. For example, when the national education system of a candidate country needs to reach the European educational standards to be smoothly integrated in the European Area of Education within the European Union.

IV. The fourth and last category refers to *secular change*, such as scientific and technological progress that creates the need to update the educational content and integrate new elements for the acquisition of new skills and competences.

The table below (see table 3.1) summarizes the results of coding the single statements of certain OECD and Balkan countries according to the categories described above. It immediately becomes obvious that almost all developed countries point to reasons of more than one category and level. Belgium, Finland and Japan are the only exceptions that find only reasons at the performance of the educational system itself. Most of the developed countries give emphasis on the education system and only half of them on the world society level. Finally, only three countries of those reviewed, Canada, Germany and Sweden report to have undertaken curriculum reforms driven by secular changes.

As the table reveals, differences in the variety of curriculum reform motivation exist also among transitional countries in the Balkan region¹⁵. In the two most developed, in terms of economy, transitional countries of the region –Romania and Bulgaria- when presenting reasons for curriculum reforms, emphasis is quite equally distributed over the four broad categories. So, in these two countries, motivation for curriculum reforms derives from three different levels: the educational institution level, the societal level and the world society level, while at the same time is being viewed as a result of social secular trends too. Particularly, the need to change educational content becomes prominently explained in terms of adaptation to social change in response to economic, socio-political or cultural development the society has to deal with. In addition, upon their recent integration in the European Union, new member states such as Bulgaria and Romania are strongly motivated by the need to reach the “European standards”.

In contrast, in low-income transitional Balkan countries, such as Ex-Yugoslavia¹⁶ and Former Yugoslav Republic of Macedonia, reasons for initiating curricular reforms are

¹⁵ The Balkan countries currently in transition are Albania, Bosnia & Herzegovina, Bulgaria, Croatia, Former Yugoslav Republic of Macedonia (FYROM), Serbia and Montenegro (formerly Yugoslavia) and Romania.

¹⁶ Moritz Rosenmund in his study referring to Ex-Yugoslavia refers to Serbia and Montenegro.

articulated in terms of issues specific to the education system or in terms of the national society's situation. Therefore, while policy makers in Ex-Yugoslavia, focus on the continuously changing institutional arrangement for the transmission of knowledge in the framework of schools, in the FYROM, they use curriculum making as an instrument for creating the prerequisites needed for planned social development.

In all countries, results show a tendency *“to put a limited selection of issues to the foreground”* (Rosenmund, 2003, p. 11-28). A single exception is Hungary whose motivation derives from a broader spectrum of reasons covering all three levels (educational institution level, societal level and world society level) and most of the specific aspects within each level.

TABLE 3.1 MOTIVES FOR CURRICULUM REFORM IN A COMPARATIVE PERSPECTIVE (BY 2001)

Country	Education institution level				Societal level				World society level			IV	Total
	I.1	I.2	I.3	I.4	II.1	II.2	II.3	II.4	III.1	III.2	III.3		
	Shortcomings of the existing curriculum	Incongruence between curriculum and learners needs or teaching approaches	Incongruence of curriculum and education system	Low performance of school system	Incongruence between educational content and social reality	Perception of new social problems	Society's adaptation to social transformation	Support of social development	Globalization-Internationalization	Adaptation to global development	Exchange with/Integration in the international system	Secular change	
<i>OECD</i>													
Australia				X			X	X	X	X	X		6
Belgium			X										1
Canada							X		X	X		X	4
Czech Rep.	X	X	X				X				X		5
Denmark	X			X			X		X	X			5
Finland			X										1
France	X	X						X					3
Germany		X	X	X			X		X		X	X	7
Hungary	X	X	X		X	X	X	X		X	X		9
Japan		X											1
Korea	X	X			X								3
Norway	X	X		X			X			X			5
Poland	X	X	X	X	X		X						6
Spain	X		X		X								3
Sweden			X			X	X	X		X		X	6
Switzerland		X			X		X	X	X				5
<i>BALKANS</i>													
Bulgaria		X					X	X	X		X	X	6
FYROM								X					1
Romania		X	X			X	X		X	X	X	X	8
Ex Yugoslavia	X		X										2

Source: Reproduction of table found in "World trends in curricula change", Moritz Resenmund, Zurich University of Applied Sciences, 2003.

These findings show that different factors have raised the awareness and created the need for policy makers to continuously review and reform secondary curricula around the world. Recent educational reforms however reveal that despite the heterogeneous motivation among different countries, quite homogeneous responses have been given to reach the principal aim of secondary education:

“to provide young people with opportunities to acquire the skills, aptitudes, values, knowledge and experiences needed to continue their education and to be active citizens and productive workers” (World Bank, 2005, p. 38).

Based on a literature review of different national curricula of several OECD and Balkan countries (Psifidou, 2004), in most of the cases secondary curriculum reforms seek to:

1) Review the educational content by:

- ensuring closer links between general education and vocational education and training;
- linking knowledge, skills and values in teaching and learning;
- reviewing curricula for ethnocentric, racist and xenophobic biases;
- integrating regional and international aspects into the curriculum;
- increasing content relevance for students of different ethnic groups;
- introducing new curricular areas and excluding outdated ones;

2) Change the organization of the content by:

- rebalancing time allocation of certain curriculum areas;
- intensifying foreign language teaching;
- intensifying civic education teaching;
- ensuring more choice and flexibility in education (program planning, extended optional instruction and a diversified combination of teaching/learning materials and methods);
- developing more efficient approaches for exceptional students and students at risk;
- introducing greater flexibility (diversifying upper secondary education through the development of multi-faceted programs which create alternative pathways for

education and training);

- diversifying the content and learning methods especially at upper secondary level (offering richer choices including balanced opportunities in vocational and general studies).

It is obvious that policy makers seek to adapt traditional practices to new market realities and to integrate some key linguistic knowledge and skills into the more dynamic economic sectors. They reform the educational content to reflect the new reality ensuring a balance between new streams and traditional disciplines, a general education and a vocational education, as well as a global context and a local context.

3.2 THE RISE AND THE FALL OF CURRICULUM KNOWLEDGE AREAS

The historical background of secondary education is highly relevant for the analytical framework of the secondary educational content evolution and its organization. Historical archetypes, more than any other parameter, can explain the shaping of secondary education models, institutional structures and curricula worldwide.

If we look then back to the history, we will find out that public education systems were constructed from roof to floor. This means that first came the foundation of universities, in the beginning of the 12th century, then from the 15th and 16th centuries on, the establishment of secondary schools, and finally in the 19th century, the creation of public primary schools.

Historically, secondary education was at the service of universities and had the mission of preparing students for higher studies. Accordingly, the secondary curriculum was built around the teaching of Latin, the language of instruction in the universities. This also explains the earlier denominations of secondary schools in many countries, such as “*Grammar school*”, “*Gymnasium*”, (still used in Germany, Austria, and some countries in Central and Eastern Europe) and “*Escuela de latinidad*”. Later, secondary education began to emerge as a distinct sector, with the main mission to train the administrative class of the new nation-states. The new secondary school started to take shape with the French

Revolution, and internationally, with the bourgeois revolutions of the first half of the 19th century¹⁷. By the end of 19th century, it is already possible to talk about a modern secondary school, partly of a terminal nature and featuring a process of segmentation into alternative tracks, academic, vocational, and general.

In the 20th century both U.S. and Soviet education policies led to secondary education models aimed at the creation of massive systems that emphasized open access and universal coverage. After 1945, what were later called comprehensive secondary schools began to spread from northern to southern Europe. In comprehensive schools all students receive secondary education in a single institution, based on a common curriculum, and may be streamed through elective subjects. This is in contrast to students being tracked and grouped either by academic ability or by choice on entering secondary education. Meanwhile, the vocational approach to secondary schooling developed rapidly in Eastern Europe.

By the 1960s and 1970s, secondary education was de facto linked more to primary than to tertiary education. The extension of compulsory education has entirely changed the concept, as well as the duration of basic education, to the point that basic education usually included lower secondary schooling. A rising average level of schooling was seen as an important objective and as a measure of the success of education reforms. Many other countries have embraced the goal of extending and expanding the notion of basic education to encompass much of what used to be the restricted-access, elitist secondary schooling.

In 1900, emerged in the United States a change on the education policy to acknowledge the shift from physical to human capital. This led to a spectacular expansion of secondary education and the adoption of massive measures to increase and facilitate access to secondary education. This new forgiving system with no tracing at early ages had been deemed egalitarian and non-elitist, but some now see it as lacking standards and accountability.

¹⁷ The experience in the United Kingdom was somewhat different, but there too, the schools were linked to the training of the emerging industrial *bourgeoisie*.

In European countries and East Asia, nearly half century elapsed between when access to secondary education opened to all. Immediately following World War II, European countries began to realize that they were lagging behind the United States in development of human capital. This realization led to radical secondary education reforms along comprehensive lines, first in Nordic countries, then in France and the United Kingdom, and later in Italy, Portugal and Spain. In the 1980 widespread criticism of the comprehensive model led to political devaluation of comprehensive schools in the United States, in Europe and in East Asia. Comprehensive reforms began to be seen as purely ideological and as leading to excessive intervention of the state in education. Comprehensive schools were criticized for creating an internal system of selection through the elective system, which tended to reproduce inequality.

While this historical background explains to a certain degree the appearance and evolution of secondary education and its content organization at international level, there are also different “structural factors” that can shape and orient curriculum policy and reform at national level (Kerr, 1999a). These factors can impact not only on the definition and approach that different countries implement to specific curriculum subjects in the secondary curriculum but also on the size of the gap between the rhetoric of policy (what is intended) and the practice (what actually happens) in these subjects.

These factors can be the:

- a) institutional framework and organization of the educational system;
- b) educational values and aims;
- c) funding and regulatory arrangements.

a) Institutional framework and organization of the educational system

The way the educational system is organized in a given country and how governments within the educational system hold responsibilities is crucial for the decision-making on curriculum matters. There are two groups of countries: those with centralized and national curriculum (e.g. England, France, Hungary, Italy, Japan, Korea, the Netherlands, New

Zealand, Spain, Greece, Sweden) and countries with federal governments and decentralized curricula (e.g. Australia, Canada, Germany, Switzerland, USA). There are considerable differences in the structure and organization between a highly specified, centrally determined curriculum and more flexible arrangements with considerable local autonomy.

b) Educational values and aims

How governments express their policy priorities has a marked influence on the formulation of curricula. There are countries with minimal reference to values in education legislation (like Canada, England, Hungary, the Netherlands and the USA); countries with national goals expressed in general terms, (like Australia, New Zealand, Italy and Spain); and countries with national values expressed in detail, those usually are the countries with very centralized systems (like Japan, Korea and Sweden).

Even though the aims set in the secondary education schools of the developed world show great similarity, certain subtle variations may be found between them, or at least between the ways in which each formulates the major general aims of its compulsory education. Whatever the educational system under consideration, the principal aims of secondary education in general terms may be grouped into two broad categories: academic and personal development goals (social and cultural values).

Nevertheless, social conditions and the multiple demands which education is expected to satisfy have been changing at an accelerating way. This has consequently given rise to variations in the scope, perspective and importance given to certain aims; and great emphasis has been placed on the strategies adopted by each country under study to achieve these aims, turning them from mere declarations of principle into full realities.

c) Funding and regulatory arrangements

Differences in educational funding arrangements can affect how countries regulate their curriculum and assessment frameworks. The source of school funds differs considerably between countries, and frequently drives or reflects the relationships between government levels in the control of education. In Japan for example, there is a tradition of consensus policy-making working alongside detailed Ministry controls. In Sweden, national funds are provided to municipalities and are not directly to specific forms of school organization. These different funding arrangements can influence the emphasis given to different thematic areas and the relation established between other subjects and areas of the curriculum.

3.2.1 Emergence of new subject areas

Contemporary secondary curriculum reforms around the world due to socio-economical factors reflect the strong emergence of new subject areas and, as a consequence, a continuous realignment of the weight of traditional types of knowledge.

More subjects have become socially and economically meaningful and therefore aim to occupy a place in the school curriculum. This is the case, for example, for *Technology*, *Economics*, *Citizenship education*, *second Foreign Language*, *Environmental education*, *Health education*, *Work related education*, etc. Other areas, previously located at the periphery of the school curriculum, have been promoted from elective to compulsory status in several countries; examples are *Foreign Language*, *Music*, *Arts* and *Physical Education*. In some other cases, the reverse has taken place, as with *Religion* or *Classical languages* (Psifidou, 2004).

Particularly in transitional countries, subjects such as *Geology*, *Earth and Space and Astronomy* in the natural sciences, as well as *Civic Education*, *Sociology*, *Political Science*, *Anthropology* and *Economics* among the social sciences have been gaining ground.

“Indeed, today there is probably no educational system, which refrains completely from teaching Economics. However, the degree to which Economics are being taught and the age of the pupils when instruction takes place vary” (Psifidou, 2004).

With the revolution of Information and Communication Technologies (ICT) and its integration in all sectors of our life, there is no doubt that the most developed OECD countries are attaching very high priority to *ICT* in their national policies and they are seeking to adjust the way their educational systems are organized and function as a result. In the case of Balkan countries and mainly those of low income, the inclusion of *ICT* is a more recent development. Lack of adequate infrastructures, limited financial resources and lack of expert staff are some of the problems that prevent the introduction of *ICT* in a large scale. Sometimes, the focus of experimentation is a small number of schools and schemes to include it in a larger scale are still under way.

The trend of lifelong learning is becoming clear in many countries, with job requirements constantly changing and people having to move back and forth into education/training and the work place. In some countries, secondary education has already been adjusted to this reality by developing flexible structures and alternative pathways in their programs. In some countries, the revised curricula introduced *Work-Related education (WRE)* for students aged 14-19, while some schools are also encouraged to provide this subject for younger students. These courses are designed to provide students with relevant occupational qualifications in order to facilitate the transition to working life, to contribute to continuing training for all citizens, and to meet industry's demand for skilled employees.

In England and Wales, the revised Curriculum implemented since August 2000, provides a non-statutory framework for *Work-Related education (WRE)* for students aged 14-19. The White Paper (1997) *Building Excellent Schools Together (BEST)* and the Green Paper *Learning is for Everyone (LIFE)* emphasized the link between *WRE* and real improvements in student motivation, achievement and lifelong learning:

“WRE is a response to the need to prepare students for the opportunities, responsibilities and experiences of adult, working life, and to set work-

related aspects of the curriculum in the wider 14 to 19 continuum” (Ministry of Education, 1998).

In Spain, as in many other countries too, it is the aim of (post-compulsory) upper secondary education to provide specific vocational training. These courses are designed to provide students with relevant occupational qualifications. They are available at two levels: intermediate level *specific vocational training* follows on from the end of compulsory lower secondary education (Educación Secundaria Obligatoria, ESO); whereas students enroll on advanced courses usually after following a general (post-compulsory) upper secondary (*bachillerato*) course.

Nevertheless, there are not only socio-economical factors that have an impact on the content of secondary education, it is also the nature of secondary education. This educational level is considered the most crucial stage for students’ personal development.

“In secondary education pupils are going through a critical period in their life of rapid individual change which in most countries coincides with a shift from the protective setting of primary school to the more unstructured environment of secondary education” (Psifidou, 2004).

This is why some educational systems, as for example in some states of USA amongst them Maryland, Utah, Texas, New Mexico and Iowa, have also recently begun to develop *Character education* programs as part of their curriculum. Through this curriculum area students learn the responsible exercise of freedom, personal honesty, self-responsibility, self-discipline, courage, love, seeking truth, doing what is good, a sense of self worth, good citizenship and a respect for others. Other schools, as in Maryland for instance, provide *Character education* through *Civics* and *Social Studies* courses that emphasize basic constitutional principles and the responsibilities of citizenship. *Character education* in some cases includes also specific class sessions on ethics and values. Finally, another approach is to infuse *Character education* into all aspects of the curriculum and extra-curricular activities.

The mission of secondary education has also changed.

“Its principal goal became to build new “glocal” identities, persons able to be fully integrated in the society and to contribute in different and creative ways to local developments with a global vision. With respect to this, secondary curricula are called to strike a balance between preserving diversity and promoting inter-cultural understanding” (Braslavsky, 2003a).

To cope with the new emergent challenge, many countries have initiated *Cross-curriculum programs* to promote cultural contact among students of diverse societies as an effective way to cultivate both the global understanding and the local cultural identity. In Korea for example, the Korean National Commission launched a “Cross-Cultural Awareness Program” (CCAP) in September 1998 for UNESCO (1999) in cooperation with the Ministry of Education of the Republic of Korea. CCAP invites foreign residents in Korea to visit Korean schools in order to share the culture of their nations with Korean youth. They refer to specific examples from their own daily lives, including what they eat, the way they greet and speak, how they play and interact with friends and what they value in their lives.

Finally, the massive access in secondary education that led some countries to undergone reforms involving a strong curriculum diversification and multiplication of study paths, as well as a disposition of more heterogenic student classrooms, called for an urgent need of guidance and counselling within these school systems. As a result, today, within many educational systems the role of *Guidance and Counselling* is greatly enhanced into secondary curriculum. There are many cases as well where *Guidance and Counselling* consists on its own a whole curriculum area. In the revised Romanian curriculum, for instance, *Guidance and Counselling* is the seventh curriculum area of the national curriculum. This curriculum area aims to fully inform students to choose the most adequate educational path for them, choosing among the theoretical, vocational or professional upper-secondary school, vocational school or the labor market.

3.3 REVISION OF EXISTING SUBJECT AREAS

We have seen that different reasons led different governments to react and adapt the secondary education content in the new emerging needs introducing new curricular subjects and excluding outdated ones. In any event however, even where no subjects have been added to or removed from secondary curricula in developed countries, to avoid any corporate reactions by the teachers of the subjects affected, the selection of contents proposed for traditionally accepted subjects is being revised to include perspectives related to new academic disciplines outside the school tradition and to exclude others from traditional disciplines that have become outdated. The goal is to deal with modern topics according to a more investigative and analytical approach, replacing the previous almost entirely descriptive methods.

Changes in the technology, the environmental, climatologic and ecological balance, call for a change in the curriculum of natural science in secondary schools. Traditional subjects, as Mathematics- one of our oldest sciences- need to be adapted to the new reality. Thus, recent efforts to reform *Natural science* and *Mathematics* education in secondary schools, recognized as one of the key learning areas by OECD countries, focus not only on raising the standards of pupils, but also on adapting their content to current applications and needs.

In England, 2001/02 was designated as the national academic year of science. During this year, the Government aimed to engage 10 to 19 year olds students in science and to boost the election of *Science* subjects in further education. One year later, in Australia, the state of Victoria was running a significant “science in schools” initiative to involve students in more practical hands-on science than has traditionally been the case. The state of Queensland in the same period had launched the “Science State-Smart State Initiative” (Government's Green Paper and strategic vision for education to 2010). The objective of both sates was to broaden student’s experience of science and influence the study options they may choose at post-compulsory level¹⁸.

¹⁸ Further information on the “science in schools” program can be accessed at: <http://www.eduweb.vic.gov.au/sofweb/science/sampleprogram/>

Changes in the content of *Natural science* and *Mathematics* introduce new themes on *Earth, Space* and *Astronomy*, and for the first time, include not only a theoretical science component, but also a technology component covering practical applications of those theories. For instance, a technology component was introduced in Canada, in the state of Ontario, under the new 1998 curriculum for science and technology in grades 1-8 (6-14 year old pupils).

Furthermore, the increased competition in the labor market and the rapid change of the economic situation creates the need for individuals to produce creative and innovative ideas and to be flexible, expecting to change career paths several times in the course of their working life. This has led governments to give a high value on building a “creative capital” and to proceed in reforming curricula and teaching methods so as to achieve this goal. In this context, the *Arts* are seen as providing a significant contribution to creativity and cultural development and the study and experience of the *Arts* is becoming universally considered an indispensable component of a well-rounded education.

In Australia, a reform of the Arts curriculum has been completed in Victoria in February of 2000. Since 2001, a new Arts syllabus for lower secondary schools has been available in schools by the Queensland School Curriculum Council. Full implementation of the new Western Australia curriculum Framework will require schools to ensure that the Arts are an integral part of the curriculum (INCA, 2000). Another representative example is France, where in 2001 was announced a new five-year plan for art education : "*Plan de cinq ans pour le développement des Arts et de la culture à l'école*". This plan completes and renews the old ateliers and fixes the new orientation of the artistic and cultural education in the schools. Its philosophy is to break the hierarchical tradition where *Arts* is a supplementary subject, below and after all the other subjects, and to give them a central place in the educational system¹⁹.

Governments also have realized that valuing cultural diversity can promote social cohesion and can fight racism and discrimination against minorities. In their effort to strike a balance

¹⁹ Further information is available online at: <http://www.education.gouv.fr/thema/arts/artsb.htm>

between preserving diversity and promoting inter-cultural understanding through secondary curriculum, many initiatives took place within and beyond the European borders. New Zealand and Korea are recognizing the multicultural nature of their country's population (including Maori and the Pacific Islands nations, alongside European traditions and those of the major immigrant groups from Asia) and have changed their curricula to include more examples of traditional Asian Arts. Furthermore, in Spain, in December 2001, the Ministry of Education and Culture issued a decree that allows for the teaching of traditional musical instruments in schools in the Autonomous Communities. The decree allows the different communities to introduce the instruments of their region, which may include such instruments as the bagpipes, guitar (for flamenco), and Basque flute. It states that the teaching of such instruments is important because of their cultural value and history in the Autonomous Communities.

However, despite all the initiatives that take place recently at international level, the issue of the low status of some subjects is a constant theme. Pupils do not feel motivated to study subjects that they consider to be of low importance to schools and employers, especially if those subjects are not included in the assessment or are not enjoyable and have failed to demonstrate their relevance to young people. Many studies, mainly conducted by OECD and UNESCO, highlight problems of student disaffection in schools and lack of school identity among students, and among other factors, the quality and relevance of the curriculum can be the cause.

Therefore, while the new focus on creativity, multicultural education and civic education provides opportunities for introduction of new and more adequate subject-areas in the secondary curriculum, there are also considerable challenges of the relative status of these subjects in schools.

According to the OECD report based on PISA results (OECD, 2000b), that draws on data from 42 mostly developed nations, student absenteeism and disaffection with school, pose widespread challenges for teachers and policy-makers. The report reveals that dissatisfaction rates vary widely across countries however in average one in four 15-year old students express a low sense of belonging at school, while one in five admits to be regularly

absent. The prevalence of both types of disaffection -sense of belonging and participation- was even higher among non-OECD countries. In Denmark and Spain, a third of students, and in Canada, Greece, Iceland, New Zealand and Poland over a quarter, appear regularly to miss school or skip classes. In Japan and Korea, by contrast, less than one in ten is in the low attendance category. Even in countries where attendance is high, however, students do not always feel happy in school. Low sense of belonging is greatest in Japan, Korea and Poland, with over a third of students feeling they do not belong in at least one respect. It is least prevalent in Hungary, Ireland, Sweden and the United Kingdom, where the proportion is below one in five.

The relevance of the educational content is a crucial point as is interconnected and influences students' motivation and student engagement in the school life.

“As secondary education becomes massive and even virtually universal in increasingly more countries, the issues of student engagement, student attitudes towards school, and the formation of student sub-cultures become critical, to the point, for instance, that they completely shape daily life in secondary schools” (Psifidou, 2004).

We have already mentioned that particularly two major curriculum areas: social studies and humanities, are being subject of a constant revision in order to improve their content and ensure relevance with the constant socio-economical and political changes at national and international level. In continuation, we will provide a more exhaustive analysis of the content evolution of *History, Geography and Civic education* among socials studies and *National language and literature* and *Foreign language* among humanities in certain OECD and Balkan countries. These specific subjects systematically grant considerable status to the promotion of cultural education and social inclusion in secondary curricula.

3.4 SOCIAL SCIENCES

In an era of growing regional, ethnic and religious tension, it becomes obvious that learning materials are not totally free of bias and value judgments and that some may contain content and opinions that are likely to inflame passions and sustain mistrust and misunderstandings. Whilst this is most recognizable in history texts, it is not limited to them. Textbooks on geography, civic education as well as in subjects of humanities may also contain partial or biased information that may lead to further tension or conflict.

Continuing disadvantage related to ethnic, economic or social groups is beginning to threaten the consolidation of peace and democracy both nationally and internationally and becomes an important obstacle to development. In response to this worrying situation, many countries are attempting to reach children at an early age before unjust practices become habit. This means reforming curricula subject areas at primary and secondary level to introduce a more multicultural perspective and to review textbooks and learning materials to confirm their accuracy and ensure that they do not reflect negative bias, prejudice, or stereotypes.

In most developed countries and in certain transition economies, social studies curriculum changes incorporate an attractive balance between knowledge updates and the inclusion of social values. On one hand, a new purpose is given to the teaching of disciplines that have been traditionally part of the core-curriculum as *History* and *Geography* and on the other hand, *Civic education* is being introduced as a new component in the curriculum of social studies. In the following sections, these tendencies are described in detail.

3.4.1 Geography

It is well known that *Geography*, as well as *History*, is a discipline that is particularly sensitive to the evolution of values. Its teaching guarantees the transmission, even the creation, of the individual and communal memory of a society. In historical terms, the teaching of *Geography* has wavered between defending national interests and conveying great ideas, two objectives far removed from learning to live together, a value that nowadays Geography curricula, among others, seek to transmit.

The emergence of *Geography* textbooks during the nineteenth century used a vision of geography based on four principles: change over time; the organization of society; the struggle for survival; and progress. At the end of nineteenth century, there was a change. The overwhelming influence of imperialist and patriotic attitudes gradually became evident in these textbooks. The emerging role of the nation-State and the spread of European civilization across the world due to colonialism influenced geography curricula. The period 1950-70 was marked by a period of stagnation, since it was thought that geography teaching, at least, should adopt a neutral attitude. This era ended during the late 1970s when, under the influence of socialist ideology, there was a conceptual change: geography teaching should contribute towards reducing social inequality. At the same time, governments themselves began to attach importance to the contribution of geography teaching to economic development (IBE, 1998a).

Today, the global organization of different societies urges *Geography* to become an educational tool for constructing bridges between different regions and different groups in the world. Geography teaching must now take into consideration new sources of information and should bear in mind particular political and economic situations, as well as the phenomenon of migrations. Pupils should learn through *Geography* that being different can be a benefit.

Enhancing geography teaching for peaceful co-existence in order to bring together different geographical scales and concepts, is a wide spread trend in secondary education. The ultimate goal is to make pupils to understand the continuity from the local to the global by including ideas about identity, otherness and universality (Bailly, 1998).

In France for example, it is given a new purpose to the teaching of Geography, that of constructing bridges between territories, isolated spaces and the world in order to oppose the disappearance of citizen geography. Nevertheless, other countries as well come to illustrate the same tendency to enhance a territorial or social approach to this subject. In the Canton of Geneva for instance, *Geography* has a new mission, that of teaching pupils a better understanding of other communities' problems and attitudes.

The discharge of political idealization is also evident in many curriculum reforms. In Portugal for example, as successive reforms followed each other, geography teaching became more and more limited to the geography of Portugal and, from 1987 onwards, on its integration into the European Community, this teaching is now becoming involved with new non-political approaches²⁰ (Claudino, 1998).

Furthermore, because of the urgent need to build a sustainable future, current curricula stress the importance of responsibility, participation, personal attitude and active contribution to environmental issues. This is being achieved either by spreading these principles through the whole curriculum, indicating the transversal character of this topic, or through specific subjects directly or indirectly linked with this theme, such as *Geography*, *Citizenship*, *Civic education*, *Music*, etc., or by introducing environmental studies as an autonomous compulsory subject.

There are some 300 definitions of sustainable development. The most commonly quoted is from Gro Harlem Brundtland, former Prime Minister of Norway, now Director General of the World Health Organization:

"Development which meets the needs of the past without compromising the ability of future generations to meet their needs" (UNESCO, 1998).

The 1992 Earth Summit in Rio recognized that the protection of natural environments and human development are part and parcel of each other, therefore "Sustainable Development"

²⁰ After the liberal reforms of Portuguese primary and secondary education at the beginning of the nineteenth century, geography lessons appeared to be concerned with knowledge linked to the ideological creation of the new liberal personality.

has a wider remit than environmental concerns. It also embraces social and economic questions such as interdependence, social justice, cultural diversity and equity.

At the Rio Summit, the role of education in promoting Sustainable Development was made explicit by Agenda 21 signed by 178 countries, the global action plan for the 21st century:

"Education should be recognized as a process by which human beings and societies can reach their fullest potential. Education is critical for promoting Sustainable Development and improving the capacity of the people to address the environment and development tissues" (UN, 1992).

To do so policy-makers reformed secondary curricula to include references within the programs of study that refer specifically to Sustainable Development or that clearly promote the study of relationships between environment, society and economy. In England, New Zealand, France and Sweden, to mention only few, Education for Sustainable Development (ESD) is a function of the whole curriculum having clear links with *Geography* but with a number of other curriculum subjects as well. In fewer cases, ESD has been introduced in secondary curriculum as an individual subject in its own. In Korea for example has been introduced under "Environmental studies", in Switzerland under "Nature/People/Environment" and in Greece under "Environmental education".

Despite these initiatives however, enhancing Sustainable Development in students' minds is still a big challenge.

"Our biggest challenge in this new century is to take an idea that seems abstract - sustainable development - and turn it into a reality for all the world's people" (Kofi Annan, 2001).

3.4.2 *History*

As national history is a very sensitive issue for all countries, its content as a school subject has always caused a lot of discussion. In many countries around the world, its content was found contaminating the youth with all those negative attitudes brewing conflicts. This led to massive curriculum reforms of history over the time. The revised textbooks of history emerged in general lines separated from traditional narratives of national pride and different from the facts and dates studied by elder generations. Some of the techniques and topics of social history and social science have been integrated into the new school history curricula, in part, responding to new understandings of developmental psychology. These innovative curriculum policies on history curricula were moving away from traditional chronological narration and therefore, the teaching of facts and received knowledge about national history, is yielding some ground to thematically organized units, emphasizing the observation of primary source (Chester and Finn, 2004).

In all OECD countries curriculum changes incorporate an attractive balance between knowledge updates and the inclusion of social values, however it is still not known the extent to which they can help to promote intercultural education and social inclusion in daily life in schools. As *History* is a discipline strongly influenced by the ideologies of a particular era, new history textbooks in post-communist countries still face many challenges in order to become a tool for enhancing tolerance and the value of learning to live together.

In Bulgaria and Romania for instance, *History* used to be a highly ideological overloaded subject before '89. It was understood by the regime as the main way to transmit ideology. Up to that time, in *History* manuals, "the other" was always presented as "the enemy". The objective was to intensify the hate for the other and idealize the national citizens, than to give valuable information of historical events enhancing mutual understanding.

Since democratization has been established, textbooks in the south East region of Europe have been undergoing an almost constant process of change. In Bulgaria and Romania, all communist ideological components have been excluded and the values transmitted through this subject have changed. Other essential changes have been made in its content too, in order to match the new national Education Standards, the European requirements and the

new challenges of a democratic society. The syllabi and manuals of *History* have been reviewed to include many references of issues on cultural and ethnic diversity, on European Union, the USA, etc. and to be built in a way that can provide formation rather than information. A more humanistic approach has been developed in order to provide social inclusion, enhance mutual understanding and prepare young people to be responsible, tolerant and active citizen. Therefore, efforts have been made to make *History* on one hand, less nationalistic, reviewing the language in use and excluding the image of enemy that was dominating, and on the other hand, to provide social inclusion. However this last, proved to be not an easy task to carry out.

Twenty years earlier, Greece had gone through a nationalist-oriented dictatorial regime in the period 1967–74, and Greek people, both in Greece and Cyprus, had suffered the calamities of a quasi-nationalist fundamentalism. The collapse of this regime ushered in a period of transition and democratic rehabilitation. As a result, a major reform in the educational system was introduced including the rewriting of history and geography textbooks. Thus, by the mid-1980's Greek textbooks had significantly been cleansed of negative or offensive attributes to Balkan neighbors and had considerably suppressed nationalist rhetoric and jingoistic presentation of wars with neighbours (Zambeta, 2001).

Despite these curricula changes, in the region however, still exist tendencies of emphasizing in history teaching the national identity at the expense of the identity of other. The contents of many history textbooks, place too much emphasis on national aspects at the detriment of international, regional and local dimensions of history. Often reflect the history of wars and violence to the detriment of giving due account of periods of peaceful coexistence, co-operation and cultural exchange, of mutual enrichment between different groups as well as between nations.

The integration of certain ethnicities in the global history as well as the integration of different ethnic minorities in the national history of specific countries remains a problematic issue. The opportunities of secondary pupils to learn the history of minorities and learn about their contribution in their society, as well as the opportunities of pupils of different ethnic groups to learn about their own customs and own traditions are very few- if not none.

For example, in the vast majority of schools, Romani people do not feature in any part of the curriculum. Despite a presence in Europe dating back some 600 years, and a population of numbering some 12 million worldwide, children in schools learn little or nothing about the Romani communities that live in their countries. They are only rarely portrayed in texts or picture books issued to non-Romani children. Most children do not learn anything about Romani history, language or culture in schools. Equally, schools do little to help overcome centuries of old stereotypes that persist about Romani people. There are strong arguments for adapting and enhancing curricula to build strong self-esteem and self-identity in Romani children. Nevertheless, such initiatives will be wasted in terms of building mutual respect and understanding between Romani and non-Romani communities unless they are combined with significant efforts within curricula as a whole to challenge the stereotypes and myths that persist about Romani people.

In the Romanian history curriculum for instance, there is a subject called “*History and Traditions of Minority*” but it is only compulsory in the curriculum of minority schools while in general mainstream schools is an optional subject only for minority pupils. Moreover, a survey conducted with 72 elementary and secondary school teachers of Serbian language, history, Art and music culture, in Serbia and Republic of Srpska on the presence of intercultural education content for dominant ethnic groups in Former Yugoslavia reported the following: the respective school textbooks contain certain information only about 15.3% on Gypsies, 29.2% on Albanians, 33.3% on Slovenians and 34.7% on Hungarians. More information can be found on Croats 51.4%, on Muslims 45.8% and finally on Macedonians 41.7% (Lieke and Dvorski, 2002). These warring results about the future of intercultural education in schools however accentuate from the conservatism mentality of teachers towards other ethnicities and the content of history. The same survey found out that teachers assume the most negative attitude towards the presence of contents regarding history and culture of Albanians, Hungarians, Muslims, Gypsies, Croats and Slovenians. More than 50% answered that they don't think it is necessary to include information on these ethnicities while overall more positive attitude had only towards Macedonians (52.8% thought it was necessary).

According to the experts of the NGO Education 2000+²¹, many specialists in Romania still have an ethnocentric conservative approach of what the content of the *History* in school should be.

“The content of the Romanians’ History is very nationalistic, the ethnic minority is not built by a multicultural perspective. It is definitely not an inclusive curriculum for minorities. There are very few references in the whole curriculum to the minorities addressing gender issues or multicultural education” (Alexandru Crisan, Head of Education 2000+).

Even though the Ministerial experts in Sofia and in Bucharest report that the current curriculum of social studies promotes social inclusion, university professors, teachers and students believe that none of the subjects are made to provide social integration.

“It has been done a lot to neutralize this nationalistic content in both subjects but they have not managed to develop a content that promotes multicultural understanding” (Professor of Philosophy, University of Sofia)²².

In Bulgaria, some good intentions exist, but often remain only in theory and do not become practice. In *Philosophy* for 11th grade for example, they tried to introduce some elements in order to provide social inclusion. They have created six elective subjects among them one is called “*Intercultural Philosophy*” but it has never been published a textbook for this subject and therefore it has never been taught even though exist in the legal provision.

In Albania, secondary history curricula and textbooks present many deficiencies (Pingel, 1999). There is only one textbook for each grade and only one historical viewpoint is described. Nothing is written about minority, the relation between national history and world history is in disfavor of the last. All the history textbooks are almost the same with their first

²¹ This Non Governmental Organization is being fully involved in the educational reforms in Romania, mainly in reforms associate with curriculum and teachers’ training.

²² Personal interview with Dr. Plamen Makariev, Professor in the Faculty of Philosophy, Sofia University (11/2003).

published variant (starting from 1994) where some of the most important changes were realized. Social, economical, cultural and religious aspects of history still occupy a very small space in history textbooks (about 16.6%). In 1999/2000 school year, four-year experimentation about the creation of oriented secondary education in scientific and social directions began. According to this new profile schools, every subject should be reorganized having new syllabuses, a modern content, new teaching methods and a new teaching technology. In history while the overall content remained the same, the historical knowledge is more in breadth and in depth now. A more balanced ration has been introduced between politic, diplomatic and military aspects on one hand, and economical, cultural and social on the other. A bigger number of countries and people were included. More space was given to treat cultural and religious developments and other actual global matters improving in that way the balance between different aspects of the history of human society.

It is important that good intentions in the region exist and the efforts have already begun as the purpose of teaching these subjects have changed from one to “*intensify the conflict*” to another “*to understand the conflict*” (Professor of History, University of Sofia)²³.

“The option in favor of an ethnocentric or an intercultural (authentic) education cannot receive any other validation but the attachment to a certain type of values. The complicated identity of each of us is forged in a world where it is more and more necessary to learn to live together, not by aggressively stressing the differences, but by capitalizing on their positive value a model of education that goes beyond the traditional ethnocentric systems” (Georgescu, 2000).

In the case of Balkan countries- and particularly in Bulgaria and Romania- the option is not yet clear enough, but neither is it (yet) totally lost. Nevertheless, the road is still a long one, particularly since the teaching of history is directly linked to the construction of new societies, where "national interests" and even "nationalist visions" are interwoven with the spreading of democratic values and the setting up of democratic institutions.

²³ Personal interview with Dr. Valeri Stefanov, professor of History of Literature, Sofia University (11/2003).

The effort though to neutralize the historical narrative and to simplify or reduce overload in history curricula, as well as to avoid offending other nations, can lead to an oversimplified and “light” content in history textbooks. For example, within days of the terrorist attacks of 11 September 2001, major textbook publishers began scrambling to revise their high school history texts in USA to include information about 11/9. An understandable, even commendable impulse, but it went badly. Because these hasty updates or supplements had to be written by early 2002 in order to be included in the 2003 editions of the textbooks, by the time they reached classrooms just about all the information in them was obsolete (Chester and Finn, 2004).

Far more troubling, because textbook publishers bend over backwards not to offend anybody or upset special interest groups, the 11/9 information, like so much else in today's history texts, was simplified and sanitized. The reader would scarcely learn that anybody in particular had organized these savage attacks on innocent Americans and citizens of 80 other nations, much less why.

“The impression given by most textbooks was more like a terrible thing happened—reminiscent of the two-year-old gazing upon the shards of his mother's shattered glass vase and saying: it broke (Chester and Finn, 2004).

3.4.3 Civic Education

The growing importance of civic knowledge made *Citizenship education* to be firmly built into the curricula of almost all the industrialized countries and particularly those that still run a transition period. Specifically in Balkan countries, many questions related to the ethical and social training of young people are being given more emphasis in the new curricula compared with former programs.

The definition and approach of Civic education in schools vary from country to country. David Kerr (1999b) reveals a number of broad contextual factors, which can determine the nature of the *Civic education*, the emphasis that a country gives to it: *the historical tradition of a country*, its *geographical position*, *the socio-political structure*, *the economic system* and finally some *global trends* common among different countries.

Apart from the different values the curriculum of citizenship education has to respond according to the specific national context, the terminology also used to describe this curriculum area varies extremely among different educational systems. In broad terms, the titles used for the curricular identity or the dominant contents in each examined country are the following (Birz ea, 2000, p. 44):

- Civics or civic education (in Austria, Belgium-French Community, Bulgaria, Croatia, Czech Republic, Estonia, France, Germany, Ireland, Italy, Latvia, Portugal and Slovakia);
- Civic culture (in Greece, Lithuania, Portugal, Romania and Spain);
- Citizenship education (in Belgium-Flemish Community, England, the Netherlands);
- Social studies (in Albania, Czech Republic, Finland, Germany, Greece, Hungary, Italy, the Netherlands, Slovakia, Sweden, Switzerland and Ukraine).

However, despite the different historical, geographical and socio-political contexts in which *Civic* and *Citizenship education* programmes have emerged in the secondary curriculum and the varied terminology used to describe them, the concept of Citizenship is coming under the effort and pressure of people to try to live and work together in modern societies. That makes *Civic education* to become part of the core-curriculum in many countries around the world at secondary level and progressively to be built across the whole educational system.

According to the latest survey conducted by Eurydice (2005a) on citizenship education in school in Europe, civic education is part of the curriculum in all countries at all three levels of general secondary education. However, the way it is included may vary widely from one country to another.

For example, in England, as a result of the 2000 review of the National Curriculum²⁴, *Citizenship education* became compulsory for all students in publicly-funded, compulsory secondary education (pupils 11 to 16 years old) in August 2002. *Citizenship* became compulsory two years after the rest of the revised curriculum. This delay aimed to give schools time to prepare fully (with the preparation of materials and the training of teachers) for the introduction of this completely new curriculum subject. Since August 2002, mandatory *Citizenship* lessons at key stages 3 (for pupils 11 to 14 years old) and 4 (for pupils 14 to 16 years old) have covered such aspects as legal and human rights and responsibilities; mutual respect and understanding in a diverse/multi-ethnic society; central and local government, the electoral system and forms of voting; the media's role in society; and the world as a global community, with specific reference to the European Union, the Commonwealth and the United Nations. Through these lessons, students are expected to develop negotiation and debating skills, and to consider other people's experiences and views. Furthermore, the Government in order to facilitate the introduction of *Civic education* in the core curriculum, has launched a Citizenship Website for teachers, students, parents and school administrators²⁵.

In Ireland, a course in democratic Citizenship: the “Civil, Social and Political education” (CSPE), based on human rights and social responsibilities became a mandatory component of the lower secondary curriculum in September 1997.

In France, Civic education has been already compulsory for some considerable time in the primary and lower secondary education, but since 1999 has become compulsory at the upper secondary level as well. At the first year of upper secondary education (*seconde*) *Civic*

²⁴ For further information on the national curriculum see: <http://www.nc.uk.net/>

²⁵ Further information on the new citizenship curriculum can be accessed via this site at <http://www.dfes.gov.uk/citizenship>

education is called "*Education Civique, Juridique et Sociale*" (Civic, Legal and Social education). This aims to reflect the importance the Government places on its citizens having a knowledge of the law and the legal system. The syllabuses are designed to enable students to debate social issues of the day in the light of their previous learning²⁶. For the final two years of upper secondary education (in the *première* and *terminale*), the broad themes within which the debate takes place are "Institutions and citizenship in practice" and "Citizenship in a changing world". In addition, revised guidelines and a revised syllabus for lower secondary *Civics education* were introduced gradually beginning in the *sixième* in September 1996 and ending in the *troisième* (the final class in the *collège* students aged 14-15 years old) in September 1999. The new syllabus is progressive in that the basic concepts of Citizenship are explored in different contexts, moving from the near and concrete to the general and the abstract²⁷. Finally, as a result of the ending of compulsory military service in France, *Civics education* in the *troisième* includes some education about the new and emerging roles of the armed forces and links with notions of solidarity and humanitarian assistance. Since 2000, in a bid to address serious concerns about the low status of *Citizenship education*, a formal examination of *Citizenship* has been introduced as part of the national examinations at the end of *collège* (the *diplôme national du brevet*).

In Bulgaria, during the last several years, a national discussion was taking place about the aims, objectives, content, organization and teaching methods of *Civic education*. This discussion has taken place on many levels and reveals differences in attitude, value, orientation and interests. One major area of agreement was that *Civic education* should be among the priorities during the education reforms. After a long and broad public discussion about the role of the *Civic education* in the Bulgarian education system, a decision was taken saying that *Civic education* may be part of the Social sciences and *Civic education* fields, which intergrades school subjects that have a leading role in the development of

²⁶ In the *seconde*, *Civics education* has four main themes: Citizenship and civility/incivility, Citizenship and integration/exclusion (with the theme of nationality), Citizenship, the law and relationships at work, Citizenship and changes to family life.

²⁷ In the *sixième* (students aged 11-12) - the individual contrasted with the citizen; in the *cinquième* (students aged 12-13) - equality, solidarity and security; in the *quatrième* (students aged 13-14) - freedom, rights and justice; and in the *troisième* (students aged 14-15) - the citizen and the republic.

children's social culture. Under the regulation for the curriculum that came into effect in August 13, 2000, *Civic education* became an interdisciplinary element of the general compulsory education and later on became a solid element through out all education levels. Currently, is being taught in the curriculum area of "*Social sciences and Civic education*" through *History*, *Geography* and *Philosophy* and the synthetic subject "*World and personality*"²⁸ (see Annexes 8, 9 and 11: Study plans for general education).

Besides this, a compulsory school leaving examination on *Social sciences and Civic education* has been implemented as a pilot project in 2001/02. However, this has been implemented only for one year and then it has been dropped out²⁹.

*"Teachers faced many difficulties on the selection of the content that has to be assessed as Civic education is an interdisciplinary area integrated in the whole secondary curriculum and not a single subject"*³⁰ (Head of the National Assessment Unit).

In Romania on the other hand, in *Civics* the person used to be presented as an object as something that belongs to somebody as a whole, now it has a value for its self and trough this subject it is being underlined the importance of the person's participation in the community life. *Civics* became compulsory from grades 3 to 12. In grades 7 and 8 is being taught through the subject *Civics*, in 9th grade through *Logic*, in 10th through *Psychology*, in 11th through *Economy* and in 12th in Social studies profile schools through *Sociology*, while in theoretical high schools through *Philosophy* (Lieke and Dvorski, 2002).

Apart from the increased emphasis on *Civic education* in the revised curricula in European and candidate countries, another common trend identified among current secondary curricula is the development of a European dimension in *Citizenship education*:

²⁸ The new interdisciplinary subject "World and personality" has been introduced in 2002/03 school year and is being taught through *History*, *Geography* and *Philosophy*. Seminars for teachers training on this curriculum subject have been organized too.

²⁹ According to information provided by the Head of the Assessment Unit, in Sofia, Bulgaria: personal interview 11/03.

³⁰ Personal Interview with the Deputy Minister for Education, Sofia, 11/03.

“Geography, History and Civic education among social studies, to name but a few, generally recognize the European dimension and the need to raise awareness among students in Europe on the European citizenship” (Medrano and Koenig, 2005).

In the majority of countries, reference to the European dimension is made within the overarching general aims of the curriculum. It generally takes the form of promoting a sense of belonging to Europe and of involvement. The Flemish Community of Belgium, the Netherlands, Sweden, the United Kingdom and Norway refer to the international or global dimension, rather than the European dimension specifically, even though the specific content of some subjects may include references to Europe. In Iceland, the sole reference to the European dimension is concerned with issues arising from cooperation with the European Union, which are considered in the 10th year of compulsory education (Eurydice, 2005a).

In fact, although the concept of the European dimension of citizenship developed swiftly in the curricula of countries that were then Member States of the European Union, this phenomenon is much more recent in the new member states of the EU³¹ and particularly in former Eastern bloc states. Thus, Slovenia or the Baltic Republics of Lithuania, Latvia and Estonia, for example, seem to have experienced an explosion of theoretical and practical initiatives on the subject, mainly dating back to the mid-1990s, prefiguring their possible future accession to the European Union. In these countries today students can study through *Geography*, the physical and political Europe: the states, regions and towns of Europe, with emphasis on neighboring countries and the Member States of the European Union, the geographical position of countries and ‘trans-European’ concepts such as climatology, environmental protection, the water cycle, etc. In addition, the renewed content of *History* offers them the opportunity to learn about the construction of the European Union, the historical position of countries and some “trans-European” concepts such as the European institutions, conflicts, alliances, etc.

³¹ According to the EU enlargement that took place in May 1, 2004, 10 new member states joined the EU: Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovak Republic, and Slovenia.

It must be pointed out however, that the concepts of citizenship and democracy are strongly connected to a Western European/Northern American philosophical and political tradition. Thus, an exception to the mainstream movement of enhancing *Civic education* within secondary curriculum is Japan. David Blake Willis in his article “Citizenship Challenge for Japanese Education for the 21st Century: “Pure” or “Multicultural?” writes:

“The study of Citizenship Education has almost exclusively been a discourse of Western thought, values and consciousness: the Greek and later the Renaissance “city-state”, the “Age of Enlightenment”, the “Age of Reason”; the Roman ideas of empire and ideology in service to a larger photo-nation collective. Canada, Australia, Israel, Britain, and Germany all share the same roots, the same wellsprings of citizen and society, of rights and responsibilities. Japan does not” (Willis, 2002, p. 21).

Questions like what is a citizen and what is citizenship are not so easily answered in the Japanese context. Citizen can be viewed in different ways in Japan, but none of the words or concepts used precisely captures the Western sense of the citizen. There is thus no discourse on *Citizenship education* as much of the rest of the world conceives. This can partially be explained because of the homogeneity among the Japanese population³². In Japan, there is no large-scale immigration, swelling constantly classrooms, as in the USA and many European countries. Moreover, Japanese see themselves naturally born as citizens, so educational interventions and other program creations are not seen as necessary. *Citizenship education* exists as a class only at the end of the high school, but this is an elective class focusing almost exclusively on Economics and Politics and is taken by few students. What Japanese schools offer on issues of concern related to *Citizenship education* are a number of specifically targeted programs for ethnic consciousness in schools. They include programs for “*Kokusai Rikai Kiyoiiku*”, education for international understanding and “*Jinken Kiyoiiku*”, education in Human Rights. However, these programs are small and have little impact on mainstream discourse.

³² By official definition Japan is 99% Japanese, the 1% of minorities are Koreans whose ancestors were forcibly brought or who migrated to imperial Japan during the colonial era (Willis, 2002).

3.5 HUMANITIES

Humanities and especially language education is given a special attention nowadays in curriculum policy development both in OECD and Balkan countries. To ensure participation in democratic life, national and regional education systems seek to provide students, by the end of compulsory schooling, with sufficient language skills for social interaction. Language as school subject, perhaps more than any area of the curriculum, has created different traditions and orientations. These have been influenced by theoretical perspectives drawn from different disciplines such as psychology, linguistics and philosophy. In the following sections, we present global tendencies of reforming national language and literature curricula in secondary education.

3.5.1 National language and literature

Language plays a crucial role in ensuring cultural diversity, democratic citizenship and social inclusion:

“The more languages you know, the more of a person you are”.

(Slovak proverb: Kol'ko jazykov vieš, tol'kokrát si človekom).

It thus has a key role to play in promoting social cohesion, one of the Council of Europe priorities identified at the Warsaw summit held in 2005 (<http://www.coe.int/summit>). The third Council of Europe Summit of Heads of State and Government held in Warsaw in May 2005 adopted an action plan in which, among other things, the following priorities were identified: promoting cultural diversity; promoting democratic citizenship and peaceful co-existence through intercultural education; and fostering inter-religious dialogue in order to “build cohesive societies by ensuring fair access to social rights, fighting exclusion and protecting vulnerable social groups” (Warsaw Declaration, §7.).

Knowledge of the languages of neighboring countries and regions facilitates peaceful cross-border co-operation. Knowledge of languages plays a key role in the democratic debate at European level, as well as in the linguistic acceptance and tolerance in the development of

open, non-racist attitudes. Proficiency in language is also essential to ensure access to the school curriculum.

Nowadays, language education is considered as a broad, all-embracing notion rooted in a policy of plurilingualism. Plurilingualism should be understood as:

“the intrinsic capacity of all speakers to use and learn, alone or through teaching, more than one language. The ability to use several languages to varying degrees and for distinct purposes is defined in the Common European Framework of Reference for Languages (p.168) as the ability ‘to use languages for the purposes of communication and to take part in intercultural action, where a person, viewed as a social agent, has proficiency, of varying degrees, in several languages and experience of several cultures’. This ability is concretized in a repertoire of languages a speaker can use. The goal of teaching is to develop this competence (hence the expression: plurilingualism as a competence)”.

It is also:

“an educational value that is the basis of linguistic tolerance, in other words, positive acceptance of diversity: speakers’ awareness of their plurilingualism may lead them to give equal value to each of the varieties they themselves and other speakers use, even if they do not have the same functions (private, professional or official communication, language of affiliation, etc.). But this awareness should be assisted and structured by the language of schooling since it is no sense automatic (hence the expression: plurilingualism as a value)”.

Therefore,

“Plurilingualism [...] constitutes a conception of the speaker as fundamentally plural and a value in that it is the basis of linguistic tolerance, an essential element of intercultural education” (Council of Europe, 2007a).

Today, there is a shift from the traditional approach treating the different components of the school curriculum in isolation, to a more innovative approach where all subjects are involved in

teaching and developing language. This is a broad concept of “languages of education” which also incorporates foreign language learning.

Language policy often causes tension and disagreement in multilingual³³ countries such as Switzerland, Norway, Belgium and Luxembourg. Switzerland is often seen as a small-scale European testing ground for language education policy. The country has four national languages, 26 cantons responsible for compulsory education, an average of 24% of allophone pupils. Having reached a decision in 2002 on setting common standards, the 26 cantonal education ministers subsequently accepted the idea of proceeding by way of the prior development of a competence model based on four or five levels of progression which will be validated empirically (at least in part) and within which it will be possible in due course to set minimum competence standards that are valid throughout the country, illustrated and put into practice through reference tests. The scientific work began in 2005 and the first version of the standards should be ready for adoption at the end of 2008 (Council of Europe, 2007b).

Another example is Norway which is not the homogeneous society it may seem: 155 different languages are spoken as first languages by students who attend compulsory education. The languages indigenous to Norway; the two official varieties of written Norwegian, various Sami languages, Kven/Finnish and Romani are included, but the most frequent used mother tongues of immigrants also deserve attention. Finnish and Sami, the latter also being the second official language with its own curriculum, are offered as second languages.

Norwegian citizens have strong statutory rights to language education, which acknowledges the multilingual nature of the country. The main goal of the latest reform in general education, implemented in 2006, is to develop basic skills that will enable students to actively participate in the knowledge society. The new national curricula for all subjects

³³ Multilingualism refers to both a person’s ability to use several languages and the co-existence of different language communities in one geographical area (European Commission, 2005b).

have competence aims clearly indicating what pupils and apprentices are expected to learn (Council of Europe, 2007b).

At European level, over the last few years, describing language competences has been the subject of several projects, including three major European developments: the OECD “Programme for International Student Assessment” (PISA), the “European Qualifications Framework”, EQF (European Commission, 2006) developed within the “Education and Training 2010” work programme of the European Commission (European Council, 2002), and the “Common European Framework of Reference for Languages”, CEFR³⁴ developed by the Council of Europe (Council of Europe, 2001a). Descriptions of language proficiency have been produced within each of these projects:

- CEFR: descriptive scheme and scales for foreign language use/learning;
- PISA: reading literacy (in “mother tongue”), in addition to literacy in mathematics and science;
- EQF: key competences for lifelong learning (communication in the mother tongue and communication in a foreign language, in addition to mathematical literacy and basic competences in science and technology, digital competence, learning-to-learn, interpersonal and civic competences, entrepreneurship, and cultural expression).

The “European Language Portfolio” (ELP) (Council of Europe, 2001b), and the “Guide for the Development of Language Education Policies in Europe” (Council of Europe, 2007a) are also tools prepared by the Council of Europe to support the development of national language policies in the Member States, enhancing plurilingualism and pluriculturalism (see chapter 3.5.2).

In 2006, work began by the Council of Europe for the preparation of a framework of reference that reflects a European consensus on basic guiding principles for plurilingualism

³⁴ Launched in 2001 after a substantial programme of research and development, the Framework document is now available in over 30 languages. It is widely used by education authorities and private institutions for curriculum planning, textbooks, testing and examinations, and teacher education. Its proficiency levels have been adopted by the European Union for the development of its European Indicator of Language Competence (European Commission 2005c), and are included in its Europass framework for the transparency of vocational qualifications <http://europass.cedefop.europa.eu/>.

generally and specifically for the languages of school education (Council of Europe, 2007b). This aims to introduce greater transparency between national/regional education policies and greater awareness of the choices made.

Regarding literature within the school curriculum, its major aim is to encourage students to read and to experience the encounter with literature as personally enriching. The notion of “*Bildung*”³⁵ is especially important in the field of literary education. The concept has been broadened since the 1970s when developments in society, the sciences and the arts led to considerable change in the conception of language, literature and learning. Since then, language and literature curricula in many Western European countries have undergone considerable change to include pragmatic texts and other media, and to focus on the learning reader and his/her development. Consequently, criteria of text selection are not restricted to the literary canon any longer. Eastern European countries did not immediately take part in this development, and the same goes for the countries of the Former Soviet Union, where school libraries still lack non-fiction books. However, Poland seems to be an exception to this rule, especially since the 1990s (Awramiuk, 2002).

Even though the use of the literary canon as the only base of instruction in national literature has been virtually abandoned since the 1970s, in Western countries a recurrent tendency towards that canon can frequently be observed, as it is acknowledged to contribute to the build the cultural capital of individuals. Thus, the National Curriculum in Britain stresses the “English Literary Heritage” (Goodwyn/Findlay, 2002). Moreover, canon is reintroduced where central assessments are taking place. The German “*Zentralabitur*” for example, effectively controls which texts are read, at least in upper secondary school.

The change did not only concern literature, the notion of canon and the criteria of text selection, but also the way literary understanding was conceptualized. A strong orientation towards the reader as the decisive function in the construction of meaning was brought

³⁵ “*Bildung*” (in German) means developing and bringing out the full potential of a human being, based on his/her nature, but stimulated and structured by education (nurture). This dynamic concept encompasses the product or relative state reached by a human being as well as the process of becoming educated/becoming one's own self. During this process the mental, cultural and practical capacities as much as the personal and social competencies are being developed and continuously widened in a holistic way (Pieper, 2006, p. 5).

about by the reception theory³⁶. Empirical research offered insights into the reading procedures of readers, their motifs and experiences of gratification. Scholars in this tradition stressed the constructive function of the reader in such a way that the textual factor was not considered to be crucial.

At the same time a stronger focus on learning and the learner can be identified in revised Literature curricula (Ongstad, 2006). In recent years, research on socialization with literature has pointed out that reading literature contributes significantly to general reading competences and that motivation to read is a decisive factor.

As a result of these developments ‘material’ and ‘formal’ conceptions of literary education have been criticized: “*literarische Bildung*” is neither just knowledge of literary tradition nor of literary genres and formal characteristics (Waldmann, 1990 apud Pieper, 2006). Instead the idea of “*literarische Bildung*” has been defined as knowledge about literary traditions, the adequate reception-competences and the ability to enjoy reading literature (Rosebrock, 2005 apud Pieper, 2006). Thus, the notion of knowing how to read literature and how to benefit from it personally is stressed and distinguished from knowing about literature.

Consequently, curricula aim at introducing students to different genres and works, but also at developing a positive attitude towards reading and stimulating reading practices. This last point is stressed for example in all German curricula and forms a strong consensus within the diverse guidelines of the different states in the Federal Republic. Literature should be experienced as a resource of personal enrichment. This is the case for the Netherlands also (especially in grades 1 to 9).

The role of literature within language education in European education systems changes considerably from primary to secondary and especially to upper secondary education. Whereas in primary and early secondary education reading literature is often integrated into

³⁶ Reception theory is a version of reader response literary theory that emphasizes the reader's reception of a literary text. In literature, it originated from the work of Hans-Robert Jauss in the late 1960s. Reception theory was at its most influential during the 1970s and early 1980s in Germany and USA.

other fields of language learning and education – learning to read, arts and ethics – later, in secondary school, literature may even develop the status of a discipline. Thus, in the Netherlands “Literature” is a distinct subject within Dutch and in the former German Democratic Republic (GDR), it counted as a separate subject.

The more students advance in the education system, the more likely the teaching of literature is to show explicit traces of literary studies and to deal with the different academic approaches. At upper-secondary school level, “Literature” often serves as preparatory subject for literary studies at university. It has been critically remarked though that this approach already dominates in lower secondary and at the end of upper secondary school, with too little awareness of the learner at this stage (Goodwyn/Findlay, 2002; Kämper-van den Boogaart, 2005 apud Pieper, 2006).

The new shift corresponds to a dominant orientation towards the learner within the early school years and a stronger focus on the literary works and their ‘adequate’ reception in later grades.

In Germany, the central purpose of reading literature within primary school is to introduce students to literary reading in such a way that they can enjoy it and develop regular reading habits. Experiences with literature are stressed and creative methods are often used. Knowledge about genres is already aimed at this stage. This remains a stable feature in secondary school. From grade 8 onwards, literary history and other contexts of literature and its reception are introduced. This specific kind of knowledge is usually meant to support interpretation and should allow for flexible use and transfer.

For secondary education, the genres become more elaborate (novel, tragedy, lyrical genres) and knowledge about literature, literary history, economic, philosophical and social contexts is often drawn in. Canonical world literature is also represented. Where orientation towards the learner is stressed, it is to be expected that text selection will be more influenced by considerations of students’ development and interests. Thus, thematic approaches serve as organizational principles (e.g. conceptions of love through literary history).

In many European states, literature which can represent the multi-cultural structure of society (e.g. migrant literature) is introduced (e.g. in Germany and the Netherlands). Especially in Western societies, such a shift towards a conception of cultural life more open to the variety of culture(s) and social existence can be observed.

On the whole, educational systems differ in the amount of freedom teachers have in shaping literary education. In the Netherlands and in Germany, the selection of texts and also the methodological approaches are largely dependant on teachers' choices. The situation in UK though is likely to be very different due to the National Curriculum.

3.5.2 Foreign languages

At the secondary level, in both general and vocational types of education, the foreign language teaching has a long-standing tradition. While for a long time, the teaching of classical languages was the dominant linguistic and cultural backdrop of mainly European educational systems, in 18th century foreign language teaching started to gain momentum in secondary education.

In the 1950s and 60s education systems of different countries and continents underwent great changes. In most countries, these major reforms led to more or less extensive changes in curricula affecting the status of foreign languages and the teaching methodology in schools. Thus, over the past 30 years certain aspects of foreign language curricula have undergone more changes than others. These changes reflected both the constant changes in teaching methods applied to foreign languages teaching, as well as the political, economic and social movements in developed countries and in the countries with transitional economies in the Balkan region.

Since 1971, a process has been actively pursued to develop a Common European Framework for foreign languages teaching. In 2001, the Council of the European Union with the collaboration of many members of the teaching profession across Europe and

beyond published the restructured edition of the “Common European Framework of Reference for Language Learning, Teaching and Assessment” (CEF).

The CEF is a policy-making tool for the international comparison of objectives and methods and the assessment of foreign language teaching. The Framework, providing a common basis for the explicit description of objectives, content and methods, aims to overcome the barriers to communication among professionals working in the field of modern languages, arising from the different educational systems in Europe. By the mutual recognition of qualifications gained in different learning contexts, it also facilitates European mobility, promotes international co-operation in the field of modern languages and enhances transparency of courses, syllabuses and qualifications (Council of Europe, 2001a).

Between 1998 and 2000, the “European Language Portfolio” (ELP) was developed and piloted by the Language Policy Division of the Council of Europe in Strasbourg (Council of Europe, 2001b). The ELP is an instrument drawing on the spirit of the “Common European Framework of Reference for Languages”. The ELP was launched during the European year of languages (2001) as a tool to support the development of plurilingualism and pluriculturalism, stressing as well the notion of language learning that continues beyond the school career: “lifelong language learning”.

The ELP proved to be very successful and effective. Thus, several European countries following its recommendations, adopted new curricula for foreign languages, promoting a communicative approach and applying information and communication technology to teaching and learning foreign languages (moving from learn “about” computers to learn “from” computers).

Other recent European and national policies on reforming foreign languages curricula, focus on making compulsory the teaching of more than one foreign language in secondary education; creating bilingual classes using foreign languages as language of instruction; and increasing language diversity by offering a great variety of languages in the curriculum (Eurydice, 2001b).

A year later, at the Barcelona European Council (2002), the Heads of State or Government called for further action *“to improve the mastery of basic skills, in particular by teaching at least two foreign languages from a very early age”*. This recommendation derives from the momentum generated by the Lisbon European Council (2000) at which the European Union set itself the strategic objective of becoming *“the most competitive and dynamic knowledge-based economy in the world”*. In 2002/03, educational policies in most countries complied with the terms of the recommendation in enabling all pupils to learn at least two foreign languages during compulsory education.

According to the latest data published by Eurydice, the Nordic countries and those in central and Eastern Europe are particularly well represented in enabling students to learn a minimum of two foreign languages for at least one year during full-time compulsory education. The second category of countries consists of those in which learning two foreign languages, while not compulsory, is possible for everyone during full-time compulsory education. In these countries, the first language is compulsory, whereas the second is offered by all schools in their provision for core curriculum options. Thus, when pupils come to choose their optional subjects, all may decide to learn a second foreign language irrespective of the school they attend.

Only in a minority of countries is it not possible for everyone to be taught two foreign languages from the beginning of full-time compulsory education. In the Czech Republic, Germany, Malta, Austria and Poland, the opportunity to learn two languages is only extended to all pupils enrolled in post-compulsory education. This is obligatory in the Czech Republic, Austria and Poland. In Ireland, Italy and the United Kingdom, the same opportunity occurs solely within a flexible curriculum devised by each school. In this latter group, the obligation to learn two languages or the possibility of doing so, as well as the educational level at which the corresponding provision begins, varies from one school to the next within a given country (Eurydice, 2005b).

The priorities assigned to foreign language learning have also led certain countries to adopt initiatives aimed at bilingual education. This refers to the teaching of one or more subject areas using the foreign language as the language of instruction. Beginning with Germany to

provide bilingual education for Social sciences in both lower and upper secondary education since 1960s, these initiatives have been intensified during the 1990s.

Two types of initiatives are particularly noteworthy in Europe and especially in France (Psifidou, 2003a). The first initiative comes under the doable effort to facilitate the integration of foreign pupils into the national education systems and to enhance intensive learning of modern foreign languages for all students. To that end, in France there were designed the “*Sections Intenationales*” (International Sections) where foreign teachers teach *History*, *Geography* and *Literature* in their own language in the country concerned, based on a syllabus established jointly by the education authorities in both countries. Later on, there were also created the “*Sections Europeennes*” (European sections) providing the teaching of a number of non-linguistic disciplines in a foreign language.

France has also co-founded with Germany the so-called “Franco-German bilingual courses” at secondary level. The courses allow the simultaneous teaching of the French and German school-leaving qualifications by means of intensive language and literature classes and the teaching of *History* and *Geography* in the language of the partner country, based on a curriculum defined jointly by the relevant authorities in both countries.

Other OECD countries have initiated similar activities too. In 1991, the Austrian ministry launched a project to promote English as a language of instruction for other subjects. In 1992 in Netherlands, bilingual schools have been created at both primary and secondary level. In Finland, since 1996, more attention is being given to bilingual education under the approval of a national project focusing on bilingual education (Kimmoke, 1999).

Some transitional Balkan countries have been the initiators of bilingual education since the 1960’s. In some cases, the predominance of Russian in secondary education systems did not prevent the development of parallel systems of schools specialized in foreign languages. Therefore, many countries such as Bulgaria, Romania, the former Czech and Slovak Federal Republic set up parallel systems of bilingual schools for the best language learners. Such systems, the so-called “language profile schools” offer subjects like *Geography*, *History*, *Literature*, *Economics*, *Mathematics* and even *Chemistry* in one or more languages other than the national language of instruction. Since the 1990s, all pupils in the general education

systems, can study at the language profile schools after passing successfully an admission examination.

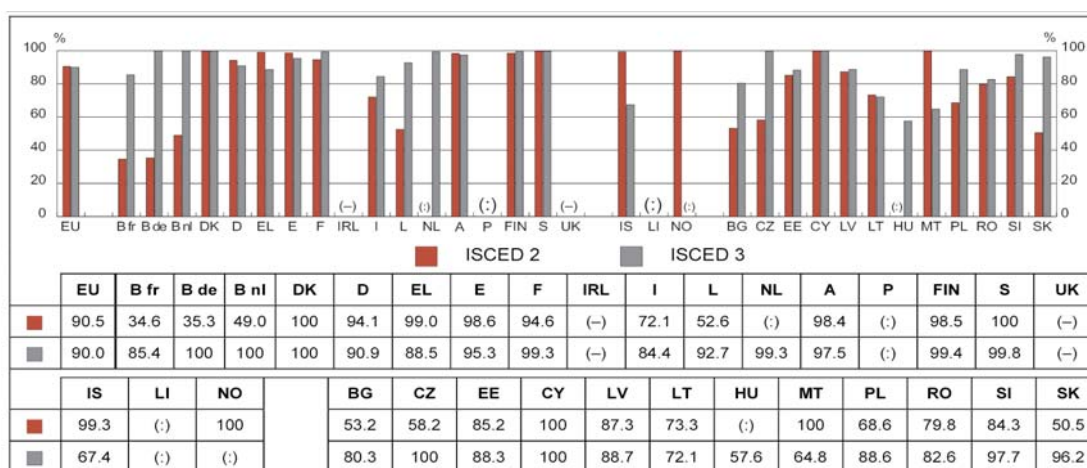
As a result of the global intensive movement towards the acquisition of more than one foreign language, nowadays, secondary schools in many countries offer a great variety of almost all European languages. In addition, there were created some profile foreign language specialized high schools that provide less frequent languages as Japanese, Chinese, Arabic etc. However, as English instruction is increasingly becoming an institutionalized routine in all over the world, some countries- generally the poorest- have been affected by the phenomenon of “*impoverished bilingualism*”. This means that English, as an instrument for international communication, has been progressing at the expense of other languages, which used to be granted space in the secondary curriculum. As a result, today, English is by far the most popular foreign language at secondary level and even if it is taught sometimes as a second foreign language, it is often better mastered than the first foreign language.

A study carried out in 2001 by Eurydice comes to verify the predominance of English language in secondary curricula of various European education systems. Although the older 15 EU Member States among them have 11 official languages, and although Eurydice (2001) has reported that 24 languages are taught across the education systems of 15 EU Member States, (either as an official language or as a minority or regional language with the status of official language³⁷), the modern languages learnt by young people in Europe today are becoming increasingly less diverse. Thus, according to Key data on Education in Europe

³⁷ The teaching and the use of the official minority languages is an issue under continuous discussion in the European Union. If all of them should be considered, apart from being an enormous cost, it could also result to be non-operational. As it is well known, different solutions have been proposed to satisfy the demands of the authorities of the different regions. Thus, for example, in the case of Spain, for the Catalan language and the rest of the official languages of some Spanish autonomies (such as the Basque region and Galicia), the European Commission and the Parliament have accepted the use of these regional languages in the institutions as well as the translation of the official documents into the respective regional language (e.g. Catalan, Basque or Galician). This measure assumes that the Spanish government finances the arisen expenses. This decision obviously goes beyond the administrative framework and contributes to the establishment of an international dimension of the minority or regional languages. It is worth mentioning that the Catalan language is being taught in several European countries, while in the University of Oxford there is also a professorship for Galician.

2001, on average, 87% of students in general secondary education learn English, 25% French, 15% German and 7% Spanish. In concrete, in Germany, Spain, France, Austria and Finland, over 90% of pupils in general secondary education are taught English. Proportions are lower (between 56% and 88%) in Belgium, Italy, Luxembourg, Iceland, Bulgaria and Romania (see Figure 3.1).

FIGURE 3.1 PERCENTAGE OF PUPILS LEARNING ENGLISH IN GENERAL SECONDARY EDUCATION (ISCED 2 AND 3), 1999/2000



Source: Eurostat, UOE found in Eurydice, 2001.

On the other hand, this emphasis on teaching modern foreign languages in schools, in many cases led to the exclusion of classical languages from the secondary curriculum. It seems that the societies of the new millennium find more urgent the need to reach the rhythm of acceleration of the world and give priorities to every day needs of the students and therefore lessons like ancient Greek and Latin have been viewed as less useful and archaic. In Austria for instance, in 1993, schools were granted more autonomy in designing their curricula and half of the secondary schools of the various types used this autonomy to replace Latin with a second foreign language (Eurydice, 2001b).

Nevertheless, there are some exceptions to this, there are countries that seek to find a balance between the teaching of ancient languages and modern and they give the same

emphasis in their time allocation in the secondary curriculum. France, Greece, Italy and Spain are good examples where the ancient languages find themselves in competition with foreign languages. In addition, the reintroduction of *Gymnasium* in 1991, in the new Länder of Germany, in Hungary, in Romania and to a lesser extent, in former Czech and Slovak Republic, also revived the interest in Latin on the educational scene (Eurydice, 2001b).

Aware of the serious consequences that can have the monopoly of English language in school instruction on the preservation of traditional and local languages in all regions, certain education authorities have introduced policies to remedy this situation by diversifying foreign language teaching. Starting at the end of the 1980s and especially in the 1990s, many initiatives were launched to offer a broader choice of languages.

Nonetheless, some countries started to make changes in this area during the 1970s or even earlier. In Poland, as part of the education reform of 1965, experiments were started to promote the learning of Eastern European languages. At the same time, in the former Czech and Slovak Republic, within the separation of general secondary education into two streams (Science and Humanities), early foreign language learning was introduced in a limited number of schools. This represented the first opportunity to learn a compulsory language other than Russian within the school system. In Romania, the range of foreign languages offered was extended in 1968 to languages other than Russian³⁸, which had lost its compulsory status a few years earlier (1965).

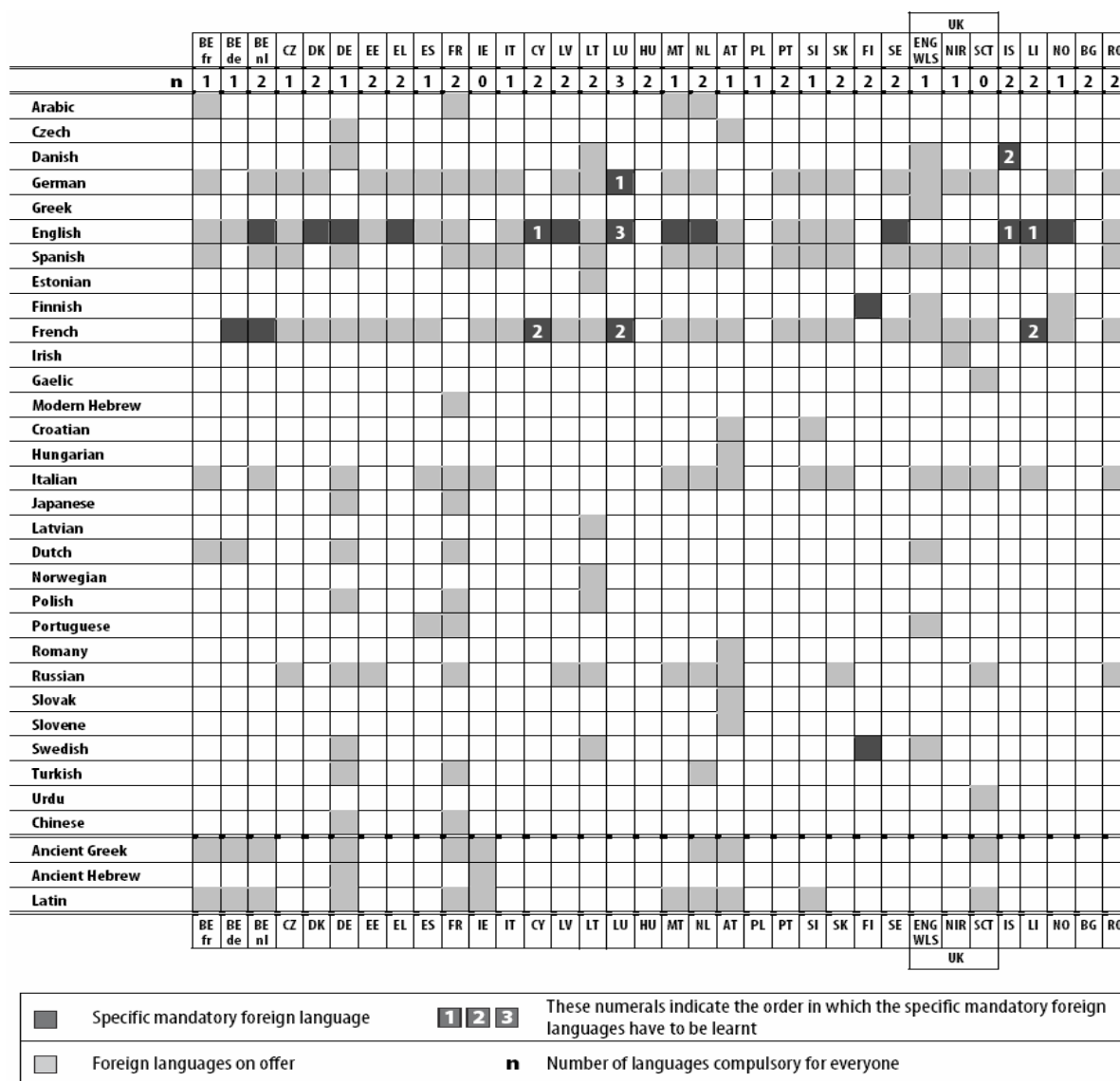
However, in the new member states and in some candidate countries, extensive changes occurred in this area quite later as a logical sequel to the major political developments. It was only in 1990's when in Hungary (1989), the former Czech and Slovak Federal Republic, Lithuania and Poland (1990), Latvia (1991), Estonia and Bulgaria (1992), Russian lost its priority language status within education systems, becoming one foreign language among others.

³⁸ The languages on offer in lower and upper secondary education were English, French, German, Russian, Italian and Spanish (Eurydice, 2001b).

Today provision for foreign languages in the curriculum offers a basis for considering the issue of linguistic diversity in education. In general lines, according to the latest study undertaken by Eurydice (2005), the curricula of some countries offer a wide variety of languages (see figure 3.2). In the EU-15, the great majority of languages referred to in official documents, which may theoretically be offered by schools, belong essentially to the Germanic group (English, German and much less frequently Dutch) and the Latin (Romance) group (with first and foremost French followed by Spanish and Italian). Official documents in some countries also refer to Russian. Furthermore, several countries include ancient languages, such as Latin and ancient Greek, in their foreign language curricula. In relation to these specifications, two particularities are characteristic of countries in central and Eastern Europe. First, Russian is included in most curricula and, secondly, ancient languages are rarely regarded as alternative options to foreign languages.

Regional or minority languages, or those in neighboring countries feature in some curricula, as in the case of Czech in Germany and Austria, Dutch in France, Croatian in Slovenia, and Finnish in Norway. Languages of immigrant populations are also sometimes specified in official documents. Examples are Arabic in the French Community of Belgium, France and the Netherlands, Turkish in Germany and the Netherlands, and Urdu in the United Kingdom (Scotland). Curricula in Germany and France also refer to languages such as Chinese and Japanese.

FIGURE 3.2 SPECIFIC FOREIGN LANGUAGES THAT ARE EITHER MANDATORY OR MAY BE OFFERED IN FULL-TIME COMPULSORY EDUCATION, ACCORDING TO DOCUMENTS ISSUED BY THE CENTRAL EDUCATION AUTHORITIES, 2002/03



Source: Eurydice, 2005b

Explanatory note

This Figure deals only with languages described as ‘foreign’ (or ‘modern’) in the curriculum/official documents. Regional or ancient languages are included solely when the curriculum regards them as alternatives to foreign languages. In the case of specific mandatory languages, only situations applicable to all pupils, irrespective of their area of study, are shown in the Figure. Where foreign languages are indicated in official documents as those on offer, all these languages are indicated, regardless of the ages or areas of study of the pupils concerned. Where no numeral in white print is shown, either the language concerned is the only specific mandatory language, or the order in which it and other specific mandatory languages have to be learnt is not specified. The small numerals in row “n” correspond to the maximum number of compulsory foreign languages that any one pupil will be obliged to study simultaneously at any given point in compulsory education.

All these languages, which according to the curriculum may be taught in principle, are not always though offered by schools because of inadequate human and financial resources, or lack of interest on the part of pupils. Neither is each school necessarily required to offer all languages referred to in curricula since these are drawn up for an entire area in which contexts and needs may vary from one region to the next.

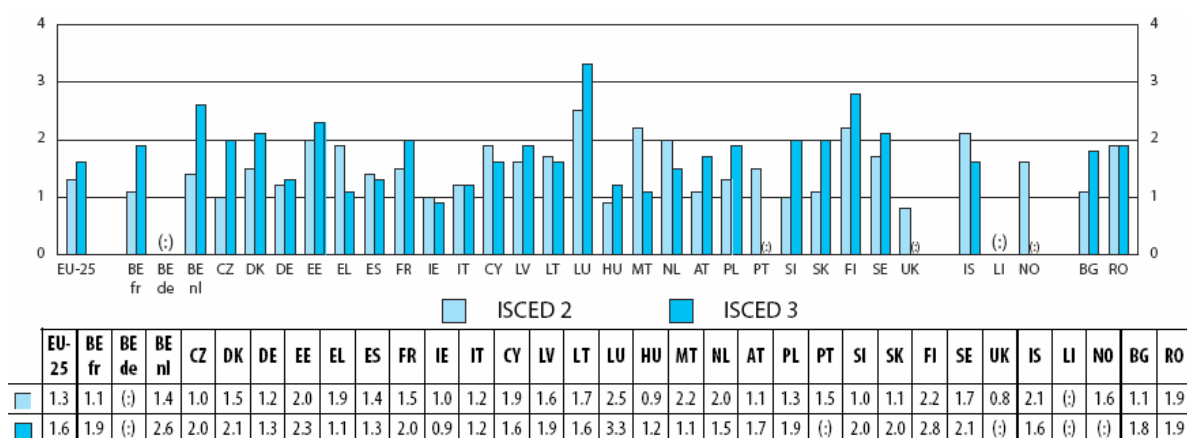
In Spain, Sweden, the United Kingdom (England and Wales) and Lithuania (in the case of the second compulsory foreign language) provided certain conditions are complied with, schools may in principle offer those languages they wish. In Hungary, Poland, Finland and Bulgaria, curricula or official documents relating to full-time compulsory education contain no list of specific foreign languages.

Therefore, the range of foreign languages that schools offer their pupils is often narrower than is proposed in the official documents. Among the reasons we have already referred to above, the lack of specialist teachers of the chosen language also places a limit on possible choices. This is the case in Ireland, Italy, Scotland and most of the transitional Balkan countries.

However, despite all these restrictions, in most countries today every young person enrolled in general secondary education learns at least one foreign language. According to the latest key data on teaching languages at school in Europe (2005b) collected by Eurydice, in general secondary education (ISCED levels 2 and 3), the average number of foreign languages studied per pupil ranges from between 1 to 1.9 in the majority of countries. Overall, the average number of languages studied per pupil is higher in general upper secondary education than in general lower secondary education. At this latter level, six countries have an average number equal to or greater than 2 (Estonia, Luxembourg, Malta, Netherlands, Finland and Iceland), while in general upper secondary education, 10 countries reach this average (Belgium Flemish community, Czech Republic, Denmark, Estonia, France, Luxembourg, Slovenia, Slovakia, Finland and Sweden). Only in Luxembourg is the average greater than 3.

In the Czech Republic and Slovenia, in which the increase in the average is greatest, the figure doubles and reaches two languages studied on average. In both countries, pupils are obliged to learn an additional foreign language from the beginning of general upper secondary education, when they are aged 15 (Figure 3.3). Similarly, the big drop in the average at that level in Malta may be partly attributed to the fact that the teaching of foreign languages is by then no longer compulsory.

FIGURE 3.3 AVERAGE NUMBER OF FOREIGN LANGUAGES LEARNT PER PUPIL, GENERAL SECONDARY EDUCATION (ISCED 2 AND 3), 2001/02



source: Eurostat, New Cronos May 2004 found in Eurydice, 2005b

Explanatory note

Only languages regarded as foreign languages in the curriculum drawn up by the central education authorities are included. Regional languages are included solely when the curriculum regards them as alternatives to foreign languages. Languages taught outside the curriculum as optional subjects are not included. In the numerator, each pupil learning a modern foreign language is counted once for each language learnt. In other words, pupils learning more than one language are counted as many times as the number of languages learnt. Ancient Greek, Latin, Esperanto and sign languages are not taken into account. Similarly excluded are data relating to pupils of foreign nationality learning their mother tongue in special classes, and those learning the language of their host country. The sum of the languages is divided by the total number of pupils enrolled at the ISCED level concerned. Pupils in special education are included except in cases in which they suffer from a disability in cognitive development.

CHAPTER 4. RECENT REFORMS IN SECONDARY EDUCATION CURRICULUM ORGANIZATION

Secondary curricula reforms and new educational content approaches include as well changes in the organization of the content. On the one hand, the revised curricula introduce changes in the time allocation to the different subject-areas by increasing or decreasing the emphasis given to them. On the other, many of the above-mentioned subjects are not taught anymore as individual subjects but they are being incorporated in the whole curriculum as interdisciplinary areas. Finally, the degree of flexibility (the hours allocated to optional classes) and diversification (the different ways of streaming, particularly streaming by ability) provided within the secondary curriculum determinates the organization of the content.

4.1 REBALANCING TIME ALLOCATION

Time allocation is one of the major issues in the field of curriculum making and development. In fact, decisions on how much time to allocate to different subjects at the central level and how much time has to be left free for school-based options are very important, as there are many consequences in terms of budget, teacher assignments and evaluation. In addition, is not an easy task to carry out, as accurate comparative information, in-depth conceptual frameworks and tools are needed to better examine the criteria and to stimulate the impact of certain decisions.

As the curriculum expansion changed the balance on the time allocated to teaching subjects, different attitudes have been observed among educational systems of OECD and Balkan countries in their effort to adjust to the timetables of the revised curricula. Some countries increased the daily instruction hours of the secondary level to introduce the new

subject-areas (e.g. Greece), while others, suffering from an overloaded curriculum, tried to simplify it by reducing the content, the school days per week and the teaching hours (Japan, France, etc.). In the middle of these two extremes are the countries that try to rebalance the school program without exceeding the preexisting time and at the same time to reinforce a number of subjects they consider most important by increasing time allocated to them.

However, despite the indented adjustments of the timetables accompanied a curriculum reform, many students, parents and teachers in different secondary schools around the world complain about the overloaded secondary curricula. For instance, teachers in Romania and Bulgaria believe that the secondary curricula are “*highly overloaded in terms of volume and highly demanding in terms of knowledge*”³⁹. This is mainly because in these countries, the school days have been reduced from six to five without reducing in the same time the teaching content but in contrast, new subjects and an extra year have been added in upper secondary schools. Therefore, instead of slim down existing subjects, common responses to overload were to add more time to the timetable or add a new subject to the curriculum. In any case, none of these countries found a proper way to face the challenge to expand curriculum without causing curriculum overload. A very careful examination and selection of what is necessary to be taught, as well as a mutual understanding of teachers that the curriculum is for students and not for them, are necessary.

Very interesting are the results of a comparative analysis of national secondary education curricula around the world carried out by Benavot (2004), in work cosponsored by the World Bank and the International Bureau of Education (IBE). According to this study, between 1985 and 2000 there is stability of the emphasis given in major curricular areas while time allocation readjustments took place only in least central areas.

“If there is a period in contemporary history when one could have expected major changes in school curriculum, particularly at the secondary level, it would have been 1985-2000. These years marked the advent of mass secondary education in many countries and regions; moreover, it was

³⁹ Personal interview with secondary teachers in Sofia and Bucharest held in 11/03.

exactly during this period that awareness of the knowledge society and, in particular, the impact of globalization on education systems set in”(World Bank, 2005, p.78).

More specifically, if we compare the proportions of total instruction time allocated to various curricular areas in lower secondary level (grades 7 and 8) in 1985 and 2000, the following interesting trends can be observed (see Figures 4.1 and 4.2):

- In all regions, it has been decreased significantly the time allocation to the curricular area of *SKILL* referring to subjects such as *Health education, Hygiene, Agriculture, Manual training, Vocational education, Domestic science* and *Life skills*.
- In all regions, except the Sub-Saharan Africa (AFR)⁴⁰, it has been increased significantly the time allocation to *Elective classes or Required-Optional classes* giving more flexibility and greater opportunities for individualized and student-centered instruction. The most characteristic example is the region of South Asia (SAS) where from no provision at all for elective subjects in 1985, in 2000 7,5% of the mean proportion of the total instructional time is being dedicated in elective subjects.
- In all regions, except of Sub-Saharan Africa (AFR) and South Asia (SAS)⁴¹, it has been introduced for the first time or it has been increased significantly the time allocated to *ICT* instruction. However, despite these changes, in all regions, the emphasis given to *ICT* is very small amount in comparison to the rest subject-areas.
- *Mathematics* is the less affected curricular area in a cross-time comparison. In all regions, only insignificant changes have been made in the time allocation of this subject-area during the past 15 years.
- Finally, the emphasis given to *Social Sciences* has been increased slightly during the last 15 years in most of the regions.

⁴⁰ In Sub-Saharan Africa region (AFR) there is no provision for elective subjects.

⁴¹ In South Asia (SAS) there is no provision for ICT instruction in both reference years (1985 and 2000).

FIGURE 4.1 MEAN PROPORTION OF TOTAL INSTRUCTIONAL TIME ALLOCATED TO CURRICULAR AREAS, IN GRADES 7 AND 8, 1985

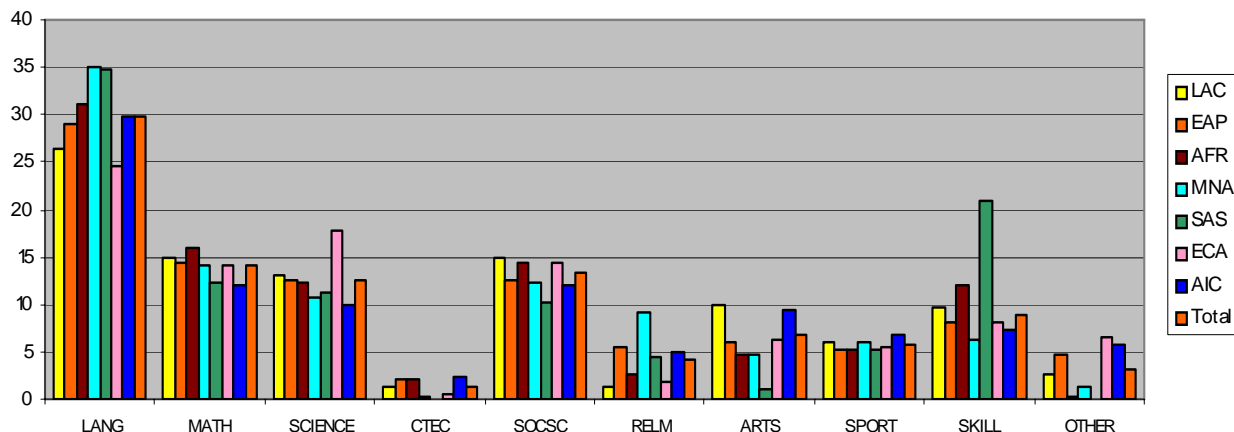
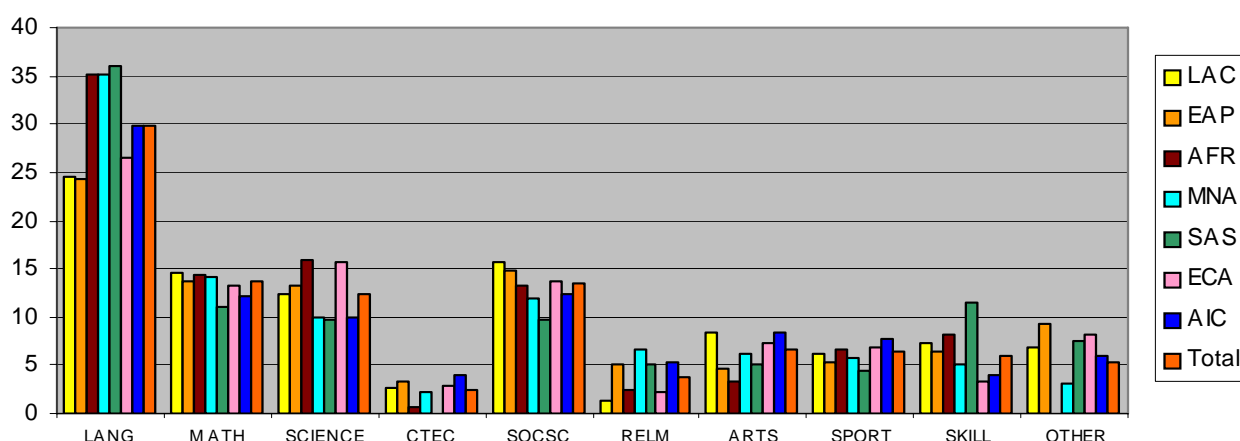


FIGURE 4.2 MEAN PROPORTION OF TOTAL INSTRUCTIONAL TIME ALLOCATED TO CURRICULAR AREAS, IN GRADES 7 AND 8, 2000



Source: Psifidou, 2005 adapted from Benavot, 2004.

Explanatory note: The general curricular areas are defined as follows:

LANG refers to Language education and includes instruction in national, official, local and/or foreign languages and literature

MATH refers to Mathematics and includes all math-related subjects

SCIENCE refers to Science and includes all general science subjects (e.g., natural, physical) as well as chemistry, biology and physics

CTEC refers to Applied Science education and includes Computers and technological subjects

SOCSC refers to Social Science and includes social studies, history, geography, social sciences, environmental studies, and civics

RELM refers to religious or moral education and/or ethics

ARTS refers to Aesthetic education and includes art, music, dance, singing, handicrafts

SPORT refers to sport and physical education

SKILL refers to subjects such as health education, hygiene, agriculture, manual training, vocational education, domestic science and life skills

OTHER refers to all remaining subjects, but especially electives or (required) optional subjects.

According to the World Bank classification of countries into regions:

LAC: South and Central America as well as the Caribbean

EAP: East Asia and the Pacific

AFR: Sub-Saharan Africa (In Sub-Saharan Africa region (AFR) there is no provision for elective subjects).

MNA: Middle East and North Africa

SAS: South Asia

ECA: Eastern Europe and Central Asia

AIC: Advanced Industrialized Countries including Western Europe, North America

From the figures 4.1 and 4.2, we can draw some conclusions on the emphasis given to some curricular areas respective to others. However, changes in the time allocation do not happen only among curriculum areas but also within the same knowledge area. Since in our study we pay particular attention to social studies and humanities, respectively the curricular areas of SOCS and LANG in the figure, it is important to examine what is the status of individual subjects within these curriculum areas. To this respect, we will analyze in continuation the position of *Civics education* within social studies and this of *Foreign languages* within humanities in the school time table of secondary education.

4.1.1 Time allocated to Civic education

The allocation of teaching hours and the curricular status of *Civics* (fixed time allocation, statutory or non-statutory approach) depend on the different educational policies and organizational models. In more or less centralized systems, *Civics* is delivered through a statutory part of the core national curriculum. While in decentralized systems, *Civics* is non-compulsory and municipalities, local school inspectorates, schools and teachers may decide upon the distribution of teaching time.

Evidently, the place occupied by *Civic education* in secondary school curricula in Europe is a function of their structure. The amount of time dedicated to this curriculum area, as with other subjects, is of course dependent on the specific education system in question and the personal preference of students (in these cases that *Civics* is an optional subject). However, in all Member States or candidate countries, a minimum number of hours⁴² always seems to be devoted in compulsory education to *Social studies* and particularly to *Civic education* (Eurydice, 2005a) (see Annexes 8, 9 and 11: Study plans for general education).

Many countries increased time given to *Citizenship education* particularly in the upper years of this phase. This reflects what Kerr (1999a) explained, “*the growing maturity of students and their ability to handle complex, topical issues*”. It is spurred by the proximity of

⁴²In the Flemish Community of Belgium and in the United Kingdom (Scotland and Wales), these are compulsory subjects, although the number of hours devoted to them is determined by the schools (Eurydice, 2002c, page 79).

students to the end of their compulsory or post-compulsory period of education and to their entry into the world as full citizens, with legal, political, economic and social rights and responsibilities.

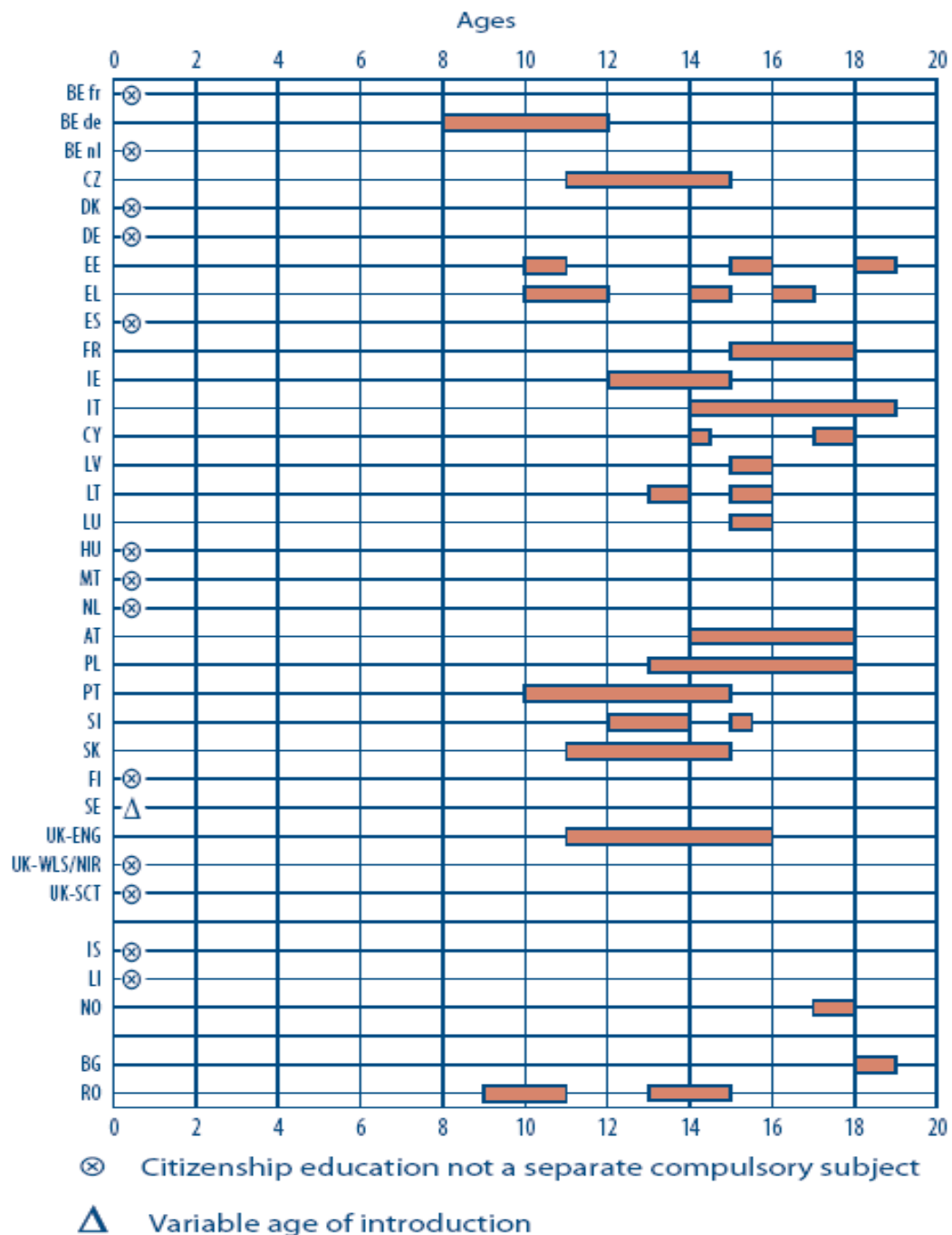
The number of years during which education for citizenship is part of the compulsory curriculum cannot always be clearly identified in countries in which the theme is integrated within other subjects or in which a cross-curricular approach is adopted. Therefore, the time devoted to citizenship education can only be indicated in countries in which the curriculum identifies it as a separate subject. Citizenship education is introduced as a separate compulsory subject in lower secondary education in most countries, except in Luxembourg, Italy, Austria, Norway and Bulgaria where it exists as separate compulsory subject at upper secondary level only (see figure 4.3).

When it is taught as a separate subject, the number of years during which its provision is compulsory varies considerably from one country to the next. This period is especially long in Italy, Poland, Portugal and the United Kingdom (England) in all of which it is five years. It is four years in Belgium (the German-speaking Community), the Czech Republic, Greece, Austria (*allgemein bildende höhere Schule*), Slovakia and Romania. In all other countries in which citizenship education is a compulsory separate subject, it is taught as such for one year, except in Estonia, France and Ireland (three years) and in Lithuania and Slovenia (two years).

Wherever a calculation is possible in secondary education, the average annual time allocation varies enormously. At lower secondary level, it is again greatest in Sweden (95 hours). In Estonia, Greece, Cyprus, Latvia, Lithuania and Romania, the average recommended annual number of hours is less than 20. In these countries, the subject is taught separately only for one or two years in lower secondary education. This variation applies also to upper secondary education. In Sweden, citizenship education is taught for approximately 90 hours. In other countries, the average recommended annual number of hours never exceeds 40, except in Austria, in which citizenship education is taught as a separate subject for four years. In most countries and within the flexible part of the curriculum which schools are free to determine as they wish, additional time is allocated to

citizenship education as a separate subject over and above the minimum number of compulsory hours shown in Figure 4.4.

FIGURE 4.3 AGE AT WHICH PUPILS ARE TAUGHT CITIZENSHIP EDUCATION AS A SEPARATE COMPULSORY SUBJECT AND DURATION OF THIS PROVISION IN PRIMARY AND GENERAL SECONDARY EDUCATION, 2004/05

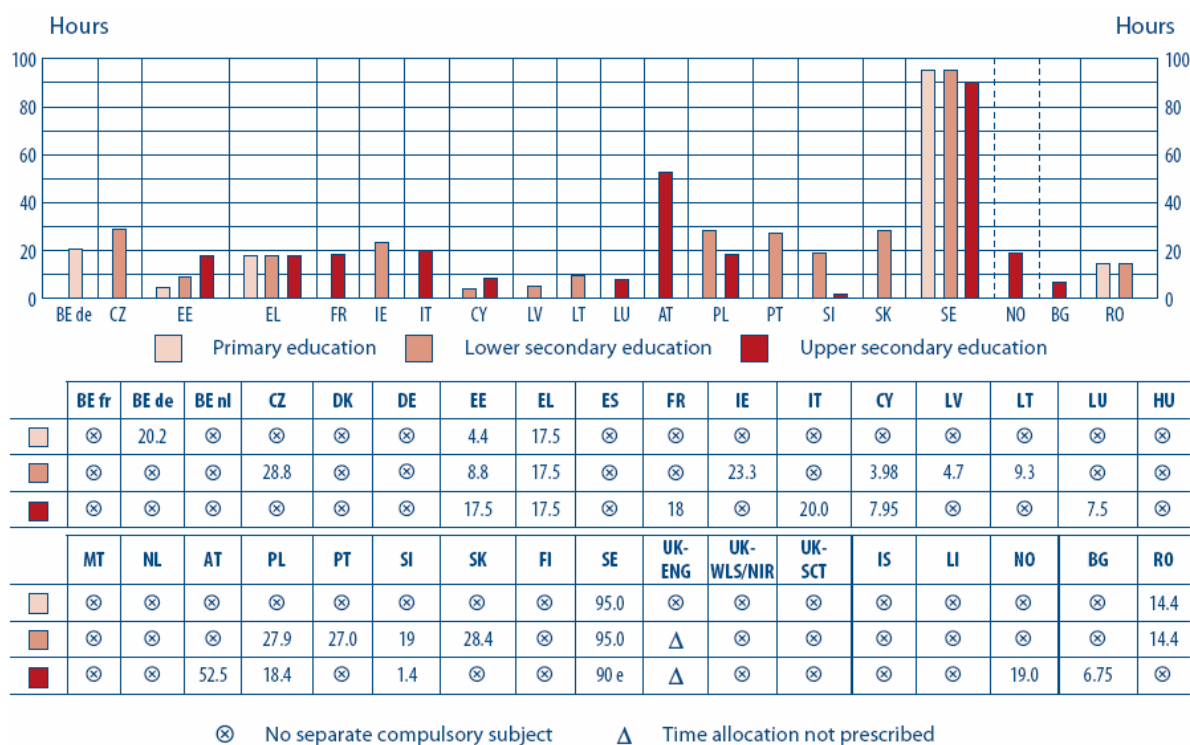


Source: Eurydice, 2005a

Additional note

Belgium (BE de): With effect from 2006/07, citizenship education became a cross-curricular theme in primary education.

FIGURE 4.4 RECOMMENDED AVERAGE ANNUAL MINIMUM NUMBER OF HOURS FOR CITIZENSHIP EDUCATION AS A SEPARATE COMPULSORY SUBJECT IN PRIMARY LOWER AND UPPER SECONDARY EDUCATION, 2004/05



Source: Eurydice, 2005a

Additional notes

Latvia: According to the new curriculum for basic education, which has to be in use by 1 September 2005, the time allocation for citizenship education as a separate subject will increase significantly.

Finland: According to the new curriculum for lower secondary education (years 7-9), in use by 1 August 2006, citizenship education is a separate subject and the time allocation has increased. The situation is similar in the case of general upper secondary education (August 2005) in which there will be two compulsory courses instead of only one.

Explanatory note

Figure 4.4 shows the minimum number of hours devoted to the compulsory teaching of citizenship as a compulsory subject in primary, lower and upper secondary education. In order to enable ready comparison between countries, the number of hours is based on a notional year of primary, lower or upper secondary education. The compulsory time allocation in hours is related to the number of years corresponding to ISCED 1, 2 and 3 respectively.

The calculation thus takes account of the following:

- the number of class periods for teaching citizenship, which are recommended in the curriculum or official guidelines;
- the length of a period (in minutes);
- the number of school days in a week or year (depending on whether the number of periods relates to the amount of teaching in a week or a year);
- the number of years that primary, lower and upper secondary education last.

4.1.2 Time allocated to foreign languages

Over the past 30 years, foreign languages have taken up a greater proportion of the overall curriculum. During the 1960s and 1970s, some countries changed the number of hours devoted to foreign languages. In the Netherlands for example, as of the secondary education act of 1963 (in force since 1968), a minimum number of hours was imposed for the three foreign languages offered in secondary schools (English, French and German).

Particularly during the last decade, timetables have been rearranged to make more room for a second foreign language. Sweden for example, when introducing its new curriculum in 1994, deemed it necessary to devote more time to teaching the second foreign language. In other countries, timetables have become more flexible, so that languages can be added more easily. The Netherlands, for example, when it introduced basic education in 1993, replaced the existing minimum timetable with a recommended timetable, consisting of a recommended total number of hours per language throughout the duration of basic education. In Hungary as well, with the introduction of the national basic curriculum in 1995, timetables became flexible and the hours devoted to foreign languages could therefore increase or decrease.

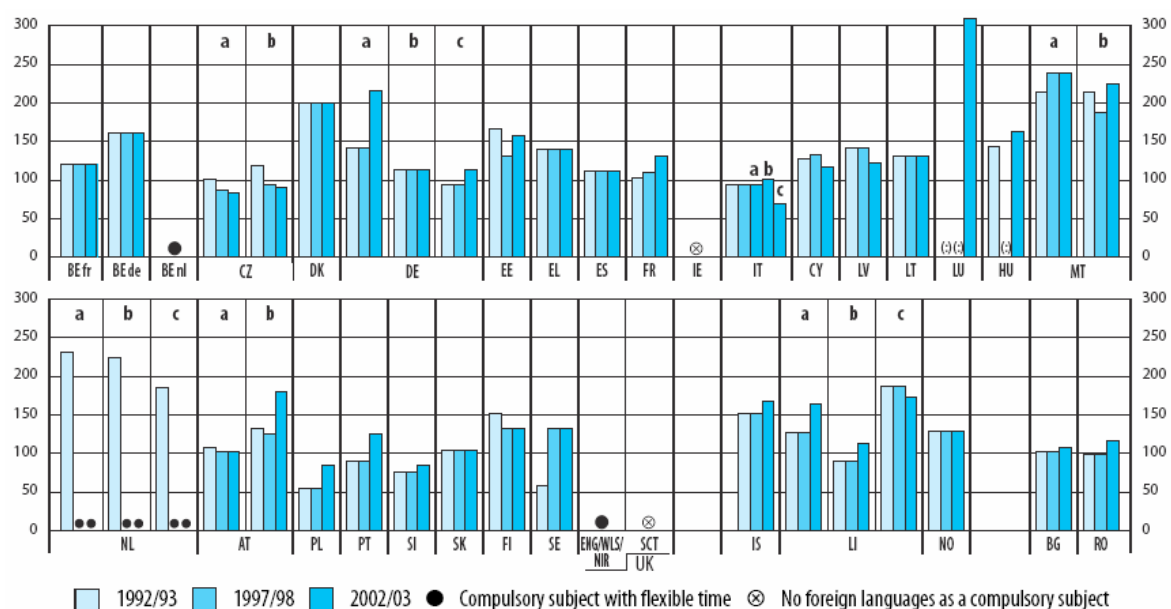
Nevertheless, there are cases in which circumstances induced a reduction in the number of hours allocated to language teaching. For instance, in the early 1980s, Iceland reduced the number of hours devoted to Danish and English.

As far as regards the last decade, there have been few important changes in the minimum amount of teaching time meant to be devoted to foreign languages as a compulsory subject in compulsory secondary education. Changes are a little more evident between 1992 and 2002. Almost half of the countries have slightly increased the number of hours allocated to foreign languages. Conversely, only few countries, namely the Czech Republic, Estonia, Cyprus, Latvia, Austria (the *Hauptschule* and *Polytechnische Schule*), Finland and Liechtenstein (the *Gymnasium*) have slightly lowered this allocation in their curricula during the period under consideration.

Furthermore, the number of hours set aside for foreign languages is much greater in secondary education than at primary level, in countries in which this provision is compulsory. In compulsory general secondary education in most countries, pupils generally had to be taught foreign languages for over 90 hours in 2002/03, except in three newer European Union Member States (the Czech Republic, Poland and Slovenia). Depending on the country concerned, the time allocation varied by as much as a factor of two, given that another three countries, namely Denmark, Germany (the Gymnasium) and Malta, made provision for 200 hours or more of foreign language teaching.

In some countries, teaching time for foreign languages may be increased at the discretion of the school head or management bodies (see Figure 4.5). This possibility is not taken into account in the Figure.

FIGURE 4.5 TRENDS IN THE MINIMUM NUMBER OF HOURS RECOMMENDED FOR TEACHING FOREIGN LANGUAGES AS A COMPULSORY SUBJECT DURING A NOTIONAL YEAR IN COMPULSORY GENERAL SECONDARY EDUCATION, 1992/93, 1997/98, 2002/03



	BEfr	BEde	BEnl	CZ		DK	DE			EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU		
				a	b		a	b	c													
1992/93	121	162	●	100	118	200	141	113	94	166	140	113	103	⊗	93	128	141	132	(-)	144		
1997/98	121	162	●	87	94	200	141	113	94	131	140	113	110	⊗	93	132	141	132	(-)	(-)		
2002/03	121	162	●	84	91	200	216	113	113	158	140	113	132	⊗	a	b	c	117	123	132	310	163

	MT		NL			AT		PL	PT	SI	SK	FI	SE	UK		IS	LI			NO	BG	RO
	a	b	a	b	c	a	b						ENG/WLS/NIR	SCT		a	b	c				
1992/93	215	215	231	225	186	108	132	56	90	76	104	152	58	●	⊗	151	128	90	188	128	103	99
1997/98	239	187	●	●	●	102	126	55	90	76	104	133	133	●	⊗	151	128	90	188	128	103	99
2002/03	239	224	●	●	●	102	180	84	125	85	105	133	133	●	⊗	168	165	113	173	128	108	117

Source: Eurydice, 2005b

Explanatory note

The time for foreign language teaching given in this Figure is based on national minimum recommendations in the curriculum for each reference year. For each year of primary education or full-time compulsory general secondary education, the teaching load has been calculated by multiplying the average daily load by the number of days' teaching a year. Recreational or other breaks of any kind, as well as time set aside for optional lessons, have not been taken into account. Total teaching times for each year are added up to obtain the total teaching load in hours for primary and fulltime compulsory general secondary education. To obtain the **notional year**, these values have been divided by the number of years of provision corresponding to each of the two educational levels.

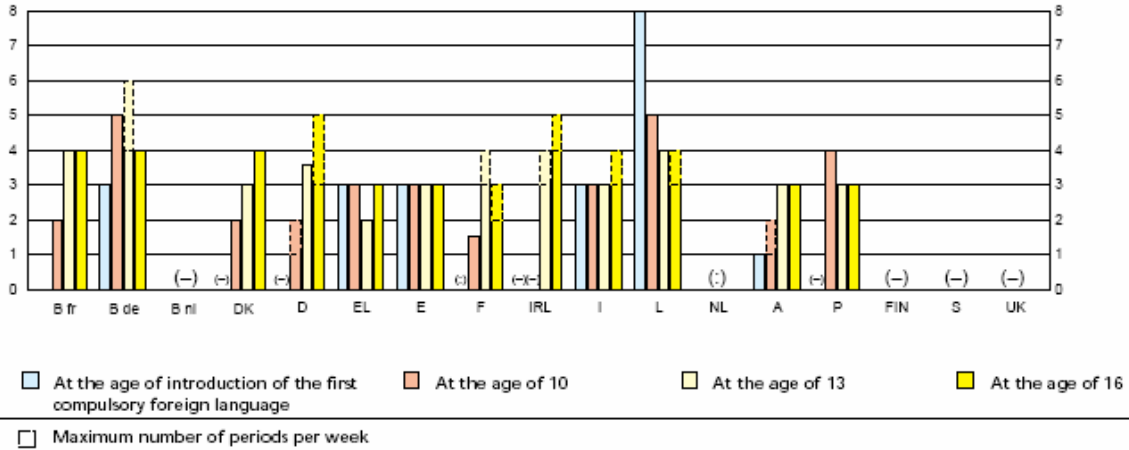
The raw data used to prepare this diagram are available for each country and each year of compulsory education on the Eurydice website (www.eurydice.org).

Full-time compulsory general secondary education normally ends on completion of general lower secondary education or the single structure, except in Belgium, France, Italy, Hungary, the Netherlands (VWO and HAVO), Slovakia, the United Kingdom (England, Wales and Northern Ireland) and Bulgaria.

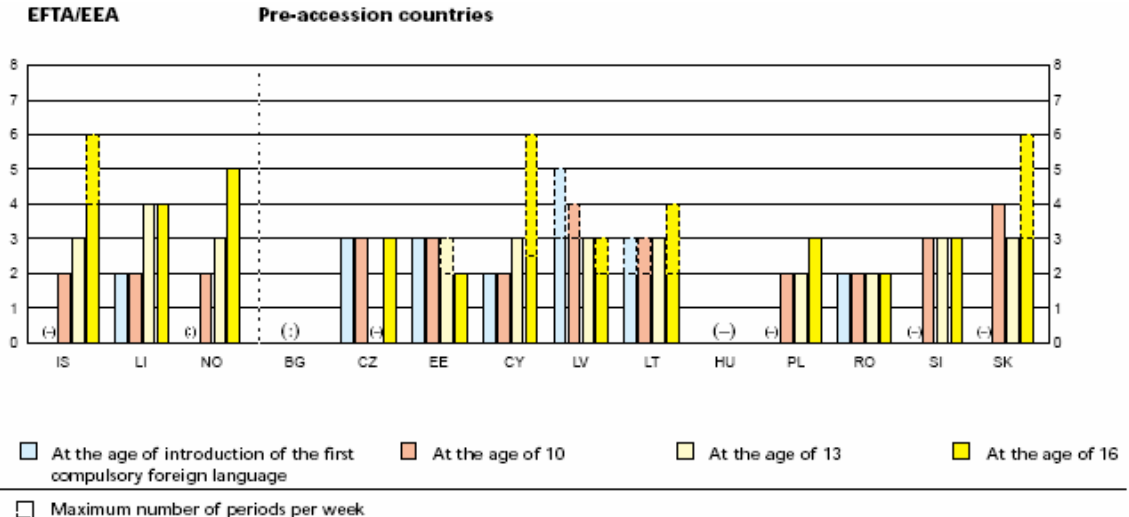
According to the data provided by Eurydice (2001b) in most countries the amount of time spent on language teaching increases as pupils progress in their education (an exception is the case of Luxembourg). In certain number of countries such as Spain, Italy, Czech Republic, Slovenia and Romania, the time allocated to foreign languages remains unchanged from the earliest to the final years of schooling. Finally, in certain countries, the time devoted to foreign languages, whilst remaining relatively stable throughout, increases somewhat (in Poland) or decreases somewhat (in Greece) at a given point in time. These variations are probably due to timetable readjustments affecting other curriculum subjects (see Figure 4.6).

FIGURE 4.6 NUMBER OF TEACHING PERIODS PER WEEK FOR THE FIRST COMPULSORY FOREIGN LANGUAGE, SCHOOL YEAR 1998/99

European Union



New member states and candidate countries



Source: Eurydice, 2001b

Explanatory note

The length of a teaching period varies from one country to the next: 40 minutes in Iceland; 45 minutes in Denmark, Germany, Greece, Liechtenstein, the Czech Republic, Estonia, Poland, Slovenia, and Slovakia; 50 minutes in Belgium, Luxembourg, Austria, Portugal, and Romania; 60 minutes in France and Italy. The variation can also depend on the year of study, as is the case in Spain (55/60), Ireland, Cyprus and Latvia (40/45), and Lithuania (35/45), or on the school, as is the case in Norway.

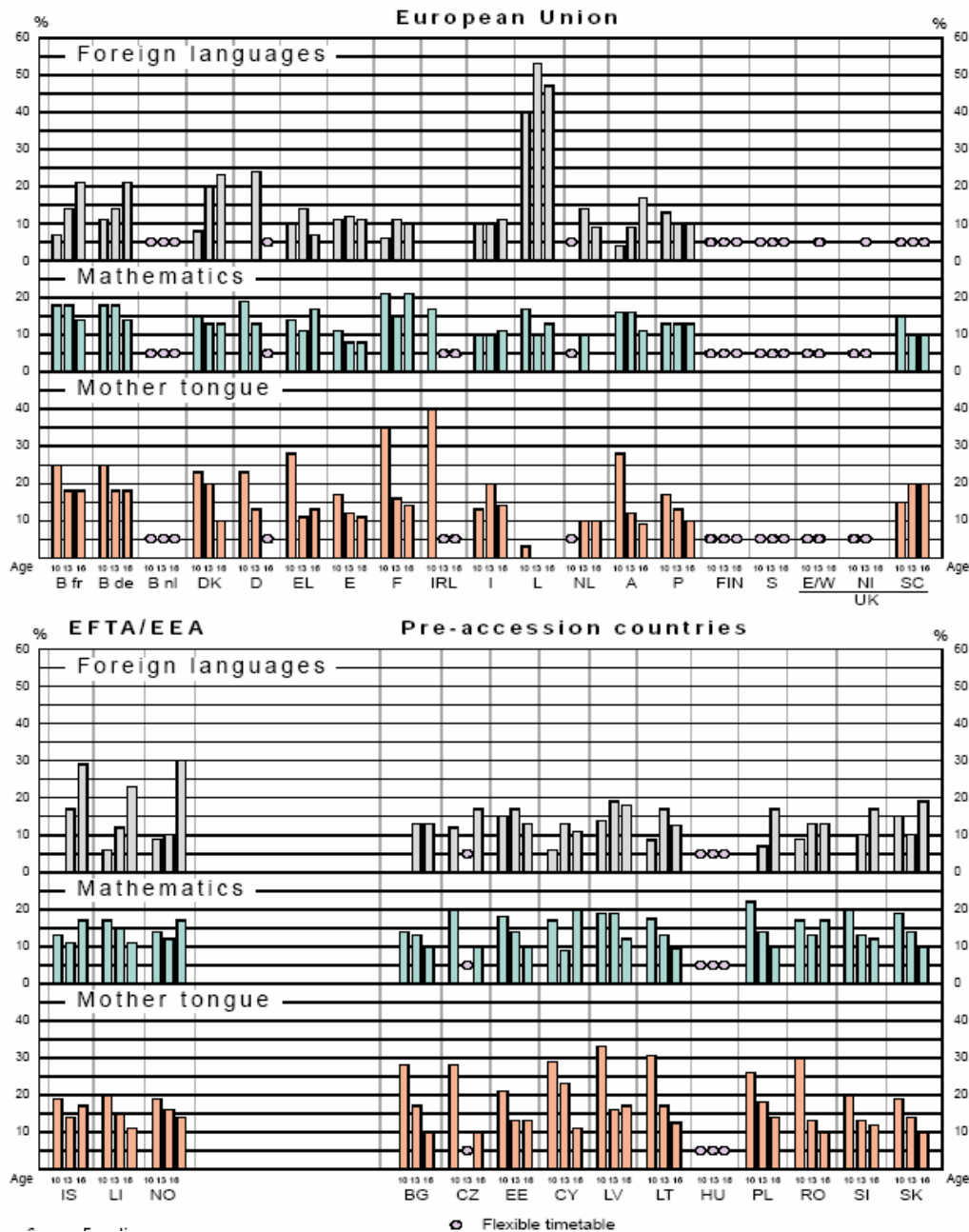
The same source provides a comparison between the time allocated to foreign languages and the time allocated to *Mother tongue* and *Mathematics* in three different stages: at age 10, 13 and 16 of the pupils (respectively primary, lower secondary and upper secondary education). In almost all countries, at the age 10, less time is allocated to foreign language teaching than to *Mathematics* or *Mother tongue*. In addition to Luxembourg, three Mediterranean countries deviate from this trend: in Spain, Italy and Portugal, the percentage of time devoted to foreign language teaching is the same as in the case of *Mathematics*.

In several countries, the proportion of teaching time allocated to foreign languages at the age of 13 remains lower or equal to that devoted to *Mathematics* and the *Mother tongue*. This situation is, however, less widespread than at the age 10. In a number of countries, the amount of time spent on teaching foreign languages is even greater than that devoted to teaching the *Mother tongue* or *Mathematics*.

At the age 16, in a majority of countries, the percentage of time devoted to foreign language teaching is higher than or equal to that allocated to either *Mathematics* or the *Mother tongue* (see Figure 4.7).

According to the latest data collected on teaching languages at school in Europe (Eurydice, 2005b), foreign languages often account for over 10% of teaching time with respect to total teaching time in compulsory general secondary education. In most countries, the proportion of time earmarked for foreign languages teaching is 10-15%. Differences between countries may be very considerable, ranging from 9% in Poland to 34% in Luxembourg. In the latter country, as well as in Belgium (the German-speaking Community), Denmark, Germany (in the Gymnasium), Estonia, Latvia, Hungary, Austria, Sweden and Iceland, foreign language teaching occupies a fairly prominent position in the share of time allocated to various subjects in the curriculum.

FIGURE 4.7 RECOMMENDED MINIMUM NUMBER OF HOURS FOR THE TEACHING OF FOREIGN LANGUAGES, MATHEMATICS AND THE MOTHER TONGUE AS A PERCENTAGE OF TOTAL TIME ALLOCATED TO ALL SCHOOL SUBJECTS AT THE AGES OF 10, 13 AND 16, SCHOOL YEAR 1998/99



Source: Eurydice, 2001b

Explanatory note

Teaching hours allocated to foreign languages can also be listed in the category of compulsory curriculum options, which is not displayed in this Figure. Data relevant to this category as well as other raw data relating to this figure can be found in www.eurydice.org

4.2 RESTRUCTURING CONTENT ORGANIZATION

Traditionally, secondary curriculum has been rigidly compartmentalized. Recently, linkages between disciplines in the curriculum increasingly are being made and policy-makers on educational issues seek to increase the curriculum flexibility and school autonomy.

4.2.1 *Curriculum flexibility*

Nowadays, based upon the view that students learn more effectively when democratic processes are modeled in practice, curricula and teachers facilitate democratic behavior within the classroom and school. Thus, a common trend among most of the developed countries with national curriculum is to give more liberty and flexibility to the local schools and students to adapt the curricula to their needs and interests. Schools increasingly are given with further freedom to organize the school day, the timetable and the holidays, while students today can choose among different tracks or from a variety of options or curricular modules that can be accumulated in many different ways.

The recent review of the World Bank (2005) (see above: figures 4.1 and 4.2) on the time allocation of different curriculum areas in lower secondary education in different regions of the world show that all regions (except Sub-Saharan Africa) include some time that can be devoted to options, elective subjects or school planned activities. In addition, the data shows that in the past 15 years the time allocation to *Elective classes or Required-Optional classes* has been increased significantly and in those regions where there was no provision for optionality before (such as the region of South Asia), now a considerable amount of the total instructional time is being dedicated in elective subjects. This curriculum expansion and increase of optionality meant to give a more student-centered and democratic character to schools.

Under this new necessity of a greater flexibility within curriculum structure, a revolutionary change in the history of education in Japan took place in July 1998 when the Curriculum Council submitted a report concerning the new curriculum to the Minister for Education.

The general principle of curriculum organization changed from the idea of providing a common education for all children to one of providing different education for each child. This marks a radical change in the Japanese curriculum because Japanese educators have believed ever since World War II that all children can enormously benefit from a common educational experience, and that providing different types of education would be discriminatory. As the new national curriculum standards have become more flexible than ever, each school is now also able to devise educational programs on their own. To develop student's individuality, more elective subjects are being provided at the lower secondary schools, though this trend is more likely at the upper secondary schools.

In England, the 2000 review of the National curriculum introduced several measures to increase flexibility in the key stage 4 (pupils aged 14-16 years old). In addition, the Education Act 2002 created a legislative distinction between key stages 1 to 3 (5- to 14-year-olds) and key stage 4 to tailor education to the needs of 14 to 16-year-old students. As a result, beginning in the 2003/04 school year, *Music, Art, Geography and History* are no longer compulsory subjects and schools are strongly encouraged to provide space in the timetable to offer a choice of subjects in addition to those required by the National Curriculum.

In contrast with this widespread trend to increase flexibility, in the Netherlands, upper secondary education reforms, implemented between 1999-2001, reduced student's freedom of choice. A new curriculum was introduced comprising of a compulsory core (50%) and a choice from four broad subject combinations, each having compulsory (30%) and optional (20%) units. This aimed to ensure that students follow a coordinated study program and are better prepared for higher vocational education (HBO) or university.

Following the same steps, Bulgaria and Romania have developed the school-based curriculum (SBC) and have increased the number of free-elective subjects. However, the time attribution and the weight given to selective subjects have changed many times following the frequent changes in the government. As a result, according to recent regulations, the time allocation to the school-based curriculum has been reduced significantly from 30% to 10% and under the latest adjustments to 3%. However, even

before these reductions, students in most transitional countries have few chances for individualized learning. Due to lack of infrastructure capacity, lack of specialized teachers, and limited financial resources, optional subjects often are not being provided in schools even if they are prescribed in the curriculum. Therefore, students have limited opportunities- if any- to learn a subject of their choice and their interests. Most of the times, schools in order to fill the minimum prescribed hours in the National curriculum for optional classes, offer extra hours of subjects that already exist in the core-curriculum, mainly *Mathematics*, *Foreign languages* and/or *National language and Literature*. This phenomenon is even more common in the last grade of upper secondary education, where students' efforts focus on the school leaving examination or the university entrance exam and therefore extension of the time dedicated to core subjects is a common practice.

4.2.2 Curriculum diversification

Diversity in the schools increases as people migrate all over the world and as more students from different social and economic backgrounds access schooling. This mass access to schools and growing differentiation among pupils gave birth to a common trend on the secondary level to take into account the diversity of pupil's interests and capabilities so as to make better use of student's potential, the so called "curriculum diversification" or "curriculum differentiation".

Curriculum differentiation is the process of modifying or adapting the curriculum according to the different ability levels of the students in one class. "*In a way, it's just shaking up the classroom so it's a better fit for more kids*" (Tomlinson, 1996). In many subject areas, common tasks can be set where different levels of achievement are expected and many outcomes can be achieved through different routes with different content.

Teachers can adapt or differentiate the curriculum by changing and/or adapting its components: the content, the methods for teaching and learning the content (sometimes referred to as the process of learning), and the methods for assessment. It might mean for

example, dividing the class into four ability groups or dividing them into mixed-ability groups in which the students with more experience help the students with less experience.

In most of the developed countries, particular attention is now being given to students needing special support and a longer period to discover and learn important concepts for subjects like *Mathematics* and *Science*. The same importance is given as well to more able and gifted students (UNESCO, 2004).

The 7th National Curriculum in Korea, implemented since 2000, offer different types of streamed curricula. For instance, ten level-oriented courses for *Maths* from grades 1 to 10 and four level of *English* courses from grades 7 to 10 as well as supplementary courses for *Korean language, social studies* and *science*, are being instituted. This is in order to extend school discretionary time, that is to say, to encourage schools to adapt the curriculum to local needs, and to encourage student's self-directed learning, independent studies and creative activities within school⁴³.

In France, under reforms proposed during 1999, the first two years of *collège* offer classes of special help to students who are experiencing difficulties with reading, spelling and arithmetic. According to these reforms, students in the *sixième* (first year of *collège*, aged 11-12) can receive up to six hours per week of supportive courses, and those in the *cinquième* (second year of *collège*, aged 12-13) up to four hours. Students may be placed in mixed-age groups for this extra help in classes of maximum eight pupils. The special tuition is included within the student's timetable, and therefore, the hours are not additional to their normal timetable. A decision on those students requiring this additional help is taken on the basis of assessments during the final year of *elementary school* education (CM2, children aged 10-11), and after a meeting between the students' elementary school teachers and their new teachers in the *sixième* of *collège*.

⁴³ Even though the 5th and 6th National Curricula allowed more autonomy to school districts and schools, in practice, neither the districts nor the schools attempted to reorganize the national curriculum according to their local situation. Some schools did, however, change the sequence of content for seasonal reasons and some districts developed their own textbooks for social studies, introducing their local heritage.

In England, there is ability grouping in several subjects. For example, in *Mathematics*, there are two differentiated programs of study –“foundation” and “higher”. The “higher program” is designed to stretch the highest attaining pupils while the “foundation program” is designed to provide an appropriate learning program for those who have not achieved a satisfactory grade at the end of key stage 3 (for pupils aged 14). It provides more direct links with applications of *Mathematics* and handles data from real-life contexts.

Swedish schools offer individual programs to assist students who may have difficulties pursuing upper secondary education. The aim of these individual programs is primarily to bring the student up to “*grundskola*” (compulsory school, students aged 7-16) proficiency in the subjects in which they are having difficulty. Subsequently, students are encouraged to undertake further studies.

In Australia, educators are sensitive concerning the possible differentiation between the sex of pupils. A research has been conducted on whether changes have occurred in the differences between the sexes in *Mathematics* achievement at lower secondary school level over the 30-year period from 1964 to 1994⁴⁴. Even though the results have not shown a clear evidence of statistical significances between the boys and girls in *Mathematics* achievement, in Victoria they started establishing separate classes for boys and girls in *Mathematics* (Afrassa and Keeves, 2001).

In most Western and Central Balkan countries though, streaming by ability is still an unknown teaching and learning policy. Thus, in the region, the children's intellectual capacity and needs are not usually considered a criterion in making up a class. Pupils are grouped in classes made up of children born in the same year or by the foreign language studied (in language profile schools) and the optional subjects chosen. In these countries, even though diversified classes in terms of nationality and ability are the rule rather than the exception, there are few cases where teachers receive training to cope with it. Current measures in Bulgaria and Romania focus on developing policies to prepare teachers in the service or future teachers to work in diversified classrooms. Policies that enchain streaming

⁴⁴ The research has been conducted under the auspices of the International Association for Evaluation of Educational Achievement.

by ability however require a good infrastructure capacity and financial resources, both elements that are lacking in the region.

4.2.3 Curriculum interdisciplinarity

Creating links between different bodies of knowledge acquired by students has long been a concern of educators. Given the fact that in most schools, the curriculum includes various subjects, a need has been felt to find ways of reducing the fragmentation of knowledge and conveying a coherent view of man and his environment. The attempt to overcome or reduce the barriers between school subjects and to arrange studies in a way that takes into consideration common elements across different areas of knowledge is usually referred to as “curriculum integration” or “curriculum interdisciplinarity”.

Glatthorn and Foshay (1985) provide a historical review and describe various methods of integration some of which can be observed in schools even today. A relatively narrow relation between two or more subjects is represented in the so-called “correlated curriculum”. The correlation for example between physical science and *Mathematics* means that the sequence of topics in *Physics* and *Mathematics* is arranged so that certain advanced techniques in *Mathematics* are taught before problems in *Physics* which can be solved by using these techniques. In general, *Mathematics* becomes closely connected to other subjects and therefore concepts and methods derived from *Mathematics* are used to attain goals in other subjects.

The appearance of curriculum interdisciplinarity is a newer trend in the organization of the educational content. This is a brand new practice mainly to Balkan countries with transitional economies. The educational content is not covered anymore by individual subjects neither delivered within strict periods, but it is organized in several curricular areas comprising different subjects of the same category. This new organization of the educational content in cross-disciplinary studies can allow a more comprehensive approach and can increase curriculum flexibility and coherence.

These cross-disciplinary studies have become popular both at lower secondary education (college) as well as upper secondary education (high school). In natural science, disciplines like *Biology*, *Physics*, *Chemistry*, *Geology* and *Astronomy* are combined into one subject. In Sweden for example, the revised science curriculum is organized in subject-related (cross-disciplinary) blocks (known as “subject blocks”) and comprises *Biology*, *Physics* and *Chemistry*. Furthermore, in the 1980s, in many educational systems *Science, Technology and Society* (STS) emerged as a widely taught school subject. Solomon (1989) described this subject as:

“essentially interdisciplinary in that it aims to explore the interactions between science knowledge, technological application, and the social context which direct the endeavors and either benefits or suffers from results” (Solomon, 1989, p. 668).

In social science, disciplines like *Geography*, *Economics*, *Anthropology*, *Sociology*, *Physiology*, *Civic education* and sometimes *History*, appear in the school programme as a single subject.

Particularly, *Citizenship education* it may be either offered as a separate stand-alone compulsory or optional subject, or integrated into one or more other subjects, such as *History* or *Geography*. A further possibility is to offer it as a cross-curricular educational theme, so that the principles of citizenship education might be present in all subjects of the curriculum. These different approaches are not mutually exclusive (Torney-Purta et al., 1999 & 2001 and Eurydice, 2005a).

Today, linkages can be found also between disciplines of different curricula areas, these refer mainly to connections made between human studies and social studies. In many high schools in USA for example, *English language* teaching is combined with *US History* and/or with *World Geography* courses. Students of every ability level can benefit from exploring the interrelationship between the two curriculum areas. Furthermore, *Literature* is being used to teach *Geography*.

Advocates present three main reasons for using a literature-based approach to teach *Geography* (Hume, 1996).

First, there is a natural link between *Geography* and *Literature*. Author and teacher Kenneth Mitchell eloquently describes this link: "*Geography has a profound influence in shaping any society....[L]iterature, like all art, is ultimately a reflection and illustration of the landscape that produced it*" (Mallory and Simpson-Housley, 1986, p. 23). Virtually every story has a setting that can be expressed in geographical terms. With a literature-based approach to geography, each discipline can enrich and reinforce learning in the other. Students also can begin to see that both *Geography* and *Literature* have relevance outside the classroom.

Second, the study of *Literature* improves comprehension of *Geography*. Research has shown that geographic awareness among students is influenced more by travel experience than by any other factor (Bein, 1990). The challenge therefore is to create a learning environment that comes closest to being in a place. A well-written piece of literature comes nearer to achieving this goal than most other resources.

Third, a literature-based approach to *Geography* improves reading comprehension. In a typical high school classroom, students' reading abilities can range from a fourth- or fifth-grade level to the equivalent of a college junior. The use of a single textbook is inappropriate for the reading levels of many, if not most, students. Students who read materials other than textbooks in their classes demonstrate a broader vocabulary and greater reading comprehension than if they use textbooks alone (Smith, Monson and Dobson, 1992, p. 370). Further, narrative is usually more intriguing and enjoyable to read than expository forms of writing. A piece of literature is more likely than a textbook to capture students' interests and imaginations. Thus, students taught with a literature-based approach have better attitudes toward reading (Smith, Monson and Dobson 1992, p. 370).

Finally, the appearance of the so called "area studies" is characteristic. These studies address the problems of a culturally distinct geographic area by the use of a comprehensive range of disciplines, including *History*, *Literature*, *Geography* and *Local languages*. Examples are Hispanic studies, South East Asian studies and African studies.

CHAPTER 5. CONCLUDING OBSERVATIONS OF PART I

The main trends of secondary curriculum reforms in OECD and Central and Western Balkan countries can be grouped in two broad areas:

1) Reforming the *educational content* by either introducing new subject areas, excluding outdated ones and/or by revising the content and aims of already existing subject areas:

a) New curriculum programs have been created:

- *ICT* to respond to the new reality of their integration in all sectors of our life.
- *Economics* to prepare students for the knowledge economy of the 21st century.
- *Citizenship* to provide the ethical and social training of young people under the need of people to live together in modern societies.
- *Second Foreign Language* to respond to the need for fast communication across countries in the newly expanded Europe of 27 countries.
- *Work-Related education* (WRE) to provide students with relevant occupational qualifications to facilitate their transition to working life; to contribute to continuing training for all citizens; and to meet industry's demand for skilled employees.
- *Character education* to support students in the transitional phase from the protective setting of primary school to the more unstructured environment of secondary education.
- *Guidance and Counselling* courses to fully inform students and help them to choose among the various pathways of the system: general or vocational upper-secondary school, or the labor market.

b) *New concepts have been added to already existing subjects*

- Sustainable development within *Geography*.
- Health education within *Sports*.
- New social values and European citizenship within *Social studies*.
- Intercultural education, tolerance and social inclusion within *History* and *Geography*.

c) *New aims have been attributed to already existing subjects*

- *History* and *Geography* aim to decrease hostility and to foster the need for mutual understanding in order to live together peacefully. Their content goes beyond a national point of view enhancing a European and International perspective (see chapters 3.4.1 and 3.4.2).
- *Sports* not only aim to exercise the body but also to educate pupils for a healthy style of life, the prevention of illness, etc.
- *Religious education* is more oriented now to make pupils understand the existence of different religions, to know their main principles and to enhance tolerance (see chapter 3.2.2).

These general trends of secondary curriculum reforms are common to the political agendas of both certain OECD and Balkan governments, but of course the degree to which these content changes have been practically introduced, differ by country to country. Despite the new ambitious aims of secondary curriculum subjects in both developed and transitional countries, it is still not known for instance the extent to which social studies and humanities curricula are designed in such a way that can help to promote intercultural education and social inclusion in daily life in schools.

2) Reforming the *organization of the educational content* by rebalancing the time allocation to different subjects-curriculum areas; increasing flexibility and diversification; and allowing interdisciplinarity:

a) Rebalance of time allocation

Different attitudes have been observed among different educational systems of OECD and Balkan countries in their effort to adjust the timetables of the revised curricula:

- some countries increased the daily instruction hours at secondary education level or introduce a new grade to make space for new subject-areas (Greece, Bulgaria, Romania);
- others, already suffering from an overloaded curriculum, tried to simplify it by reducing the content, the school days per week and the teaching hours (Japan and France);
- in the middle of these two extremes, are the countries which tried to rebalance the school timetable without exceeding or decreasing the preexisting time.

Between 1985 and 2000, the time allocation to major curricular areas at lower secondary level has been remained quite stable in all regions of the world. Some readjustments took place only in least central areas. For instance, on one hand, it is observed a decrease in the time allocation of subjects such as *Health education, Hygiene, Agriculture, Manual training, Vocational education, Domestic science* and *Life skills*, which reflect the trend toward deferring vocational content until the upper secondary education. On the other hand, there is an upward move of *technology* and *ICT* instruction, which is expected to continue in the upcoming years.

As far as regards time readjustments in upper secondary education, two contradictory tendencies have been observed among different countries. On one hand, several countries are currently placing an emphasis on developing basic literacy and numeracy, and this has led to pressures on other subject areas, including the *Arts, Music* and *Physical education*. On the other hand, the increased competition

in the labor market and the rapid change of the economic situation led governments to give a high value on building a “creative capital”, and to proceed in reforming curricula and teaching methods to achieve this goal.

In the first case, the number of hours devoted to the non-core subjects are being reduced and fewer schools are including curricular areas such as *Arts* and *Physical education* in the school leaving examination. While in the second case, the latter curriculum subjects from being elective subjects have been promoted to compulsory.

However, despite all the initiatives that take place recently at international level in order to increase quality and relevance in secondary curricula, the issue of the low status of some subjects is a constant theme. Pupils do not feel motivated to study subjects that they consider to be of low importance to schools and employers, especially if those subjects are not included in the assessment or are not enjoyable and have failed to demonstrate their relevance to young people. Many studies highlight problems of student disaffection in schools and lack of school identity among students, and among other factors, the quality and relevance of the curriculum can be the cause. The constant need to revise and renew the educational content provided in secondary schools taking always into consideration the individual needs and interests of students, is indubitable.

b) Increase flexibility

It is observed today a tendency to decentralize the responsibilities of educational planning. Increasingly more autonomies within the same countries receive a greater independence on planning and organizing the school curriculum. This is more frequent in countries with federal governments such as USA, Germany and Spain where more liberty and flexibility is given to the local schools to adapt the curricula to their needs and interests. As a result, school directors, teachers and students have further freedom with respect to the organization of the curriculum and school timetable. In more

centralized systems such as Greece, Romania and Bulgaria, the main responsibility for education remains at central level under the Ministry of Education.

Decentralizing the planning and managing of secondary schools is quite a sensitive and highly political issue though. Therefore, some contradictory tendencies can be identified not only across countries but within the same countries as well. The Bulgarian and Romanian governments for instance, under an effort to increase the flexibility within secondary schools, developed the school-based curriculum (SBC) or/and increased the variety of free-elective subjects. However, the time attribution and the weight given to selective subjects have changed many times following frequent changes in the government. According to the latest revisions, from 30% dedicated to SBC, this amount has been decreased to less than 10% today. Nevertheless, often, due to limited infrastructure capacity and lack of human and financial resources, even those optional subjects prescribed in the national curriculum are not taught in schools. Therefore, frequently students have limited opportunities- if any- to learn a subject of their choice and their interests.

However, despite these technical barriers, nobody can argue today that a greater variety of options is offered to students who can choose among different tracks or a variety of curricular modules that did not exist before. According to the data provided by the World Bank (2005), not only in Western Europe and North America but also in Eastern Europe, in East Asia and Pacific, in South and Central America and Caribbean as well as in middle East and North Africa a significant amount of time is being allocated during the last 15 years in elective subjects or school planned activities (see figure 4.1).

c) Increase diversification

Particular attention is now being given to students needing special support and a longer period to discover and learn important concepts for subjects like *Mathematics* and *Science*. The same importance is given as well to more capable and gifted students. However in most transitional Balkan countries, streaming by ability is still an unknown

teaching and learning policy which to be implemented would require additional human and economic resources.

d) Create interdisciplinarity

Under the ultimate goal to ensure coherence in the educational content delivered to secondary education students, different approaches have been applied in the countries under examination. To mention but a few practices, in the revised curricula, single subjects are being grouped into broader knowledge areas, new area studies appear and special attention is being given in the sequence with which several topics appear within different subjects.

This interdisciplinary approach on organizing the educational content can fight against the acquisition of fragmented knowledge and can enhance coherence, while important knowledge, techniques and skills acquired in one subject can be used in the comprehension of another one.

To this end, *Geography, History, Civic education, Political studies, Environment* often are placed under the curriculum area of “social studies”. *Chemistry, Biology, Physics, Astronomy* are organized within the curriculum area of “natural science”. *National language and literature, Philosophy, Sociology, Foreign languages* are studied through “human studies”. In addition, linkages are made even between different areas. Representative is the example coming from the USA, where in some secondary schools *National language* is used to teach *History*, while *Literature* is used to learn *Geography*.

It becomes obvious from what we have seen in this part of our study that different countries around the world seek to reform their secondary curricula responding to the twin challenge of expanding access and improving quality and relevance. We have referred to a number of European country examples as well as Japan and USA that illustrate these good intentions but also to countries that are still far behind to reach these objectives (such as certain transitional Balkan countries). Of course, we should not forget that curriculum reform is a

long and complex process. Many years are needed for the design of new educational content and the publication of new textbooks, and many more for their introduction in all levels of schooling. Bearing this in mind, an analysis of the evolution of the secondary education system in Bulgaria is presented in continuation.

PART II. INSTITUTIONAL AND LEGISLATIVE FRAMEWORK OF SECONDARY EDUCATION IN BULGARIA

The second part of this study (Chapters 6-9) is dedicated in the presentation of the institutional and legislative framework of secondary education in Bulgaria and the evolution of its national education system. Chapters 6-9 are organized as follows: the sixth chapter presents the geopolitical and socioeconomic framework in Bulgaria; the seventh chapter presents a short historical review of the secondary education system under the communist part; the eighth chapter describes the evolution of the Bulgarian education system upon the change of the regime and up to date, underlining the most significant changes in its secondary educational content; and finally, the ninth chapter summarizes our main observations.

CHAPTER 6. THE NATIONAL CONTEXT

Founded in 632, Bulgaria is the contemporary country in Europe with earliest internationally recognized independence (635 AD).

A country often described to lie at the crossroads linking the East and West, Bulgaria was the centre of Slavic Europe during much of the Middle Ages, exerting considerable literary and cultural influence over the Eastern Orthodox Slavic world by means of the Preslav and Ohrid Literary Schools. Bulgaria is also the birthplace of the Cyrillic alphabet, the second most widely used alphabet in the world, which was developed in these two schools in the tenth century. Bulgaria is well known for its rich folklore, distinctive traditional music, rituals and tales.

The country's contribution to humanity also continued in the nineteenth and twentieth century, when individuals such as John Atanasoff - born in USA with Bulgarian origin, regarded as the father of the digital computer, while the world's first digital wristwatch was developed by the Bulgarian Peter Petroff. A number of noted opera singers (Nicolai Ghiaurov, Boris Christoff, Raina Kabaivanska, Ghena Dimitrova) and successful artists (Christo Javacheff, Pascin, Vladimir Dimitrov) popularized the culture of Bulgaria abroad.

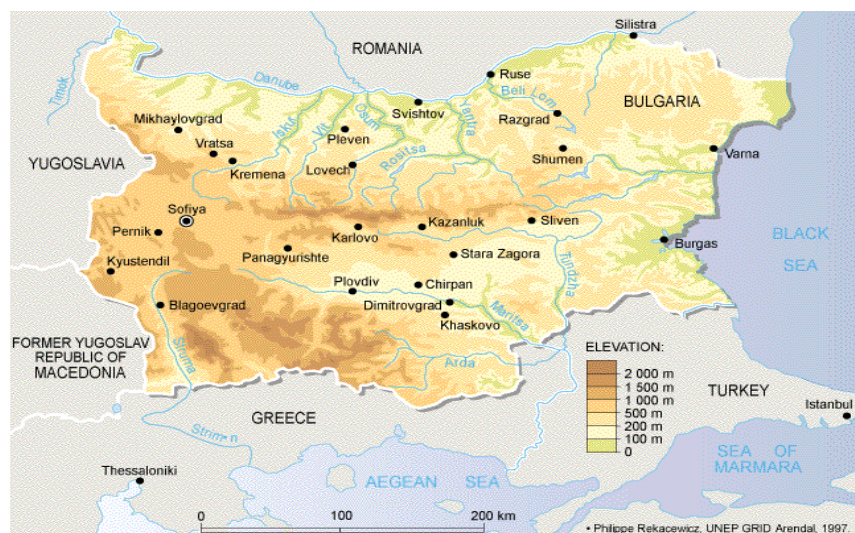
A number of ancient civilizations, most notably the Thracians, Greeks, Romans, Slavs and Bulgars, have left their mark on the culture, history and heritage of Bulgaria. The country today has nine UNESCO World Heritage Sites. Of these, two are Thracian tombs (one in Sveshtari and one in Kazanlak), three are monuments of medieval Bulgarian culture (the Boyana Church, the Rila Monastery and the Rock-hewn Churches of Ivanovo), while the Pirin National Park and the Srebarna Nature Reserve represent the country's natural beauty. The ancient city of Nesebar is a unique combination of European cultural interaction, as well as, historically, one of the most important centers of naval trade in the Black Sea. In addition, the Varna Necropolis, a 3200-3000 BC burial site, contains what are believed to be the oldest examples of worked gold in the world.

For its rich culture, crucial geographical situation and its interesting transitional history from 45 years of communism to the democracy and its recent integration into the European Union in January 2007, we have chosen to examine the secondary curriculum reform in Bulgaria. In the following two subchapters, we will present the geopolitical and socioeconomic frameworks of the country. This will help us to better understand the organization and evolution of the educational system described in chapters 7 and 8.

6.1 GEOPOLITICAL AND HISTORICAL FRAMEWORK

Bulgaria with a surface of 110 912 sq. km. lies on the west coast of the Black Sea and is surrounded by Turkey, Greece, the Former Yugoslav Republic of Macedonia (FYROM), Yugoslavia and Romania. The coastal length is 378 km. Figure 6.1 shows the regions of the country and the location of the major cities. The landscape varies, with the north being predominantly the Danube plain and the south consisting of regions that are more mountainous.

FIGURE 6.1 MAP OF BULGARIA



Source: <http://www.infoplease.com/atlas/country/bulgaria.html>

Between 1987 and 1999, Bulgaria consisted of nine provinces “*oblasti*”; since 1999, it has consisted of twenty-eight subdivided into 263 municipalities “*obshtini*” (see figure 6.1). The municipalities in turn are composed of human settlements “*naseleni mesta*”, of which there are about 5 300 in total including 238 towns, 4 440 villages and 560 smaller units like hamlets, railway stations, monasteries. Larger municipalities, like Sofia, are subdivided into boroughs “*rayoni*”. Below municipalities, there is sometimes another sub-level of local government, the mayoralty “*kmetstvo*”, but usually they have no budget and only limited representation in the municipal councils.

6.1.1 Brief history of Bulgaria

The Bulgarian Empire was established in 681 AD. The country had many ups and downs during its history. From the beginning of the 11th century until the second half of the 12th century, Bulgaria was the rule of Byzantium. In 1187, it won its independence and one of the most successful and fruitful periods in the middle-age history of Bulgaria followed. In 1396 Bulgaria was conquered by the Turks and had remained under Turkish rule for nearly 5 centuries. After the Russian-Turkish war, Bulgaria was liberated, although, according to the provisions of the Berlin Treaty, it had the status of an autonomous principality dependent on the Turkish sultan. In 1908, Bulgarian prince Ferdinand declared the independency of Bulgaria and it became self-dependent nationally sovereign country of equal rights.

A totalitarian rule established in the country after World War II and went on until 1989. During this time, the country was known as the People's Republic of Bulgaria (PRB) and was under the administration of the Bulgarian Communist Party (BCP). BCP transformed itself in 1990, changing its name to Bulgarian Socialist Party. Currently it is part of the governing coalition government. Bulgaria was considered a Soviet satellite state during the Cold War, a member of the Warsaw Pact and the Comecon.

The communist Prime Minister Georgi Dimitrov, appointed in 1946, guided the framing of the 1947 constitution on the model of the 1936 constitution of the Soviet Union. The Bulgarian legislation guaranteed citizens equality before the law; freedom from discrimination; a universal welfare system; freedom of speech, the press, and assembly; and inviolability of person, domicile, and correspondence. However, those rights were qualified by a clause prohibiting activity that would jeopardize the attainments of the national revolution of September 9, 1944. Citizens were guaranteed employment but required to work in a socially useful capacity. The constitution also prescribed a planned national economy. Private property was allowed if its possession was not “to the detriment of the public good”. By the end of 1947, all private industry had been confiscated and financial enterprises had been nationalized in the culmination of a gradual government takeover that began in 1944.

In 1948, a split between Yugoslav President Josip Broz Tito and Soviet leader Joseph V. Stalin threatened the group of countries in Eastern Europe under the Soviet influence. After expelling Yugoslavia from the Cominform⁴⁵, Stalin began exerting greater pressure on the other East European states, including Bulgaria, to adhere rigidly to Soviet foreign and domestic policy. He demanded the communist parties of those countries to become virtual extensions of the Communist Party of the Soviet Union (CPSU) by purging all opposition figures. The Bulgarian government curtailed religious freedom by forcing Orthodox clergy into a Union of Bulgarian Priests in 1948, taking control of Muslim religious institutions, and dissolving Bulgarian branches of Roman Catholic and Protestant churches in 1949 (Crampton, 1997).

⁴⁵ The Cominform (Communist Information Bureau) was a Soviet-dominated organization of Communist parties founded in September 1947 at a conference of Communist party leaders in Szklarska Poręba, Poland. The Soviet leader Joseph Stalin called the conference in response to divergences among the Eastern European governments on whether or not to attend the Paris Conference on Marshall Aid in July 1947. The intended purpose of the Cominform was to coordinate actions between Communist parties under Soviet direction. As a result, the Cominform acted as a tool of Soviet foreign policy and Stalinism. It had its own newspaper (titled *For Lasting Peace, for People's Democracy!*), and it encouraged unity of Communist parties under Soviet direction. The Cominform was dissolved in 1956 after Soviet rapprochement with Yugoslavia and the process of De-Stalinization (source: Crampton, 1997).

The Chervenkov period (1950-56) featured harsh repression of all deviation from the party line: suppression of culture and the arts along the lines of Soviet-prescribed socialist realism, and isolation from the occidental world. By early 1951, Chervenkov had expelled one in five party members, including many high officials, in his campaign for complete party discipline. In 1950, a new agricultural collectivization⁴⁶ drive began. In spite of intense peasant resistance, the collectivization drive continued intermittently until the process was virtually complete in 1958.

The independent course taken by Tito's Yugoslavia in 1948 caused Bulgaria to seal the Yugoslav border; the 1953 Balkan Pact among Greece, Yugoslavia, and Turkey further isolated Bulgaria, which by that time had cut all relations with Western countries. The Soviet Union remained Bulgaria's only ally. It supplied military and economic advisers and provided the model for Bulgarian social services, economic planning, and education in the early 1950s. Over 90% of Bulgarian exports and imports involved Soviet partnership, although the Soviets often paid less than world prices for Bulgarian goods. Because the primitive, mainly agricultural Bulgarian economy closely resembled that of the Soviet Union, Soviet-style centralized planning in five-year blocks had more immediate benefits there than in the other European states, where it was first applied in the early 1950s.

The death of Joseph Stalin in March 1953 had strong repercussions in Bulgaria. In 1953 Bulgaria resumed relations with Greece and Yugoslavia, some political amnesties were granted, and planners discussed increasing production of consumer goods and reducing the prices of necessities.

⁴⁶ Collective farming regards a system of agricultural organization in which farm laborers are not compensated via wages. Rather, the workers receive a share of the farm's net productivity. The political process of institutionalizing this aforementioned system is known as collectivization. The Soviet Union undertook the world's first campaign of mass collectivization from 1929-1933. Soviet peasants in collective farms received a type of dividend after compulsory deliveries were made to the state. However, this was an example of forced collectivization, and should not be confused with voluntary collectivization, such as the one that takes place in a Kibbutz. Forced collectivization historically had dire results, often causing famine and mass starvation when implemented on a large scale (source: Crampton, 1997).

Zhivkov ran Bulgaria for the following thirty years being completely loyal to the Soviets but pursuing a more moderate policy at home. Relations were restored with Yugoslavia and Greece, the labor camps were closed, the trials and executions of Kostov and other “Titoites” (though not of Petkov and other non-Communist victims of the 1947 purges) were officially regretted. Some limited freedom of expression was restored and the persecution of the Church was ended. The upheavals in Poland and Hungary in 1956 were not emulated in Bulgaria, but the Party placed firm limits and restraints to intellectual and literary freedom to prevent any such outbreaks.

Although Zhivkov was never a despot in the Stalinist mold, by 1981, when he turned 70, his regime was growing increasingly corrupt, autocratic and erratic. This was shown most notably in a bizarre campaign of persecution against the ethnic Turkish minority (10% of the population), who were ordered to adopt Bulgarian names. Many fled to Turkey, and the issue strained Bulgaria's economic relations with the West (Crampton, 1997).

By the time the impact of Mikhail Gorbachev's reform program in the Soviet Union was felt in Bulgaria in the late 1980s, the Communists, like their leader, had grown too feeble to resist for long the demand for change. In November 1989, demonstrations on ecological issues were staged in Sofia, and these soon broadened into a general campaign for political reform. The Communists reacted by deposing the decrepit Zhivkov and replacing him with Petar Mladenov, but this gained them only a short respite. In February 1990, the Party voluntarily gave up its claim on power and in June 1990, the first free elections since 1931 were held, thus paving Bulgaria's way to multiparty democracy.

After the fall-down of the totalitarian rule, significant changes have started in the country, which have led to the establishment of democratic principles of government and political plurality. According to the new Constitution of the country, adopted in 1991 by the Seventh Great National Assembly:

“the Republic of Bulgaria is a law-governed country, which shall guarantee the life, dignity and right of the individual and shall create conditions conducive to the free development of the individual and the civil society” (National Assembly of the Republic of Bulgaria, 1991).

The Constitution has become the basis for building a new democratic, law-governed and social state. According to its provisions, no limitations in rights or privileges, based on race, nationality, ethnical belonging, sex, origin, religion, education, convictions, political affiliation, personal and public position or property status are allowed.

In order to guarantee the impossibility for recovery of the totalitarian regime under whatever form, the Constitution explicitly states that the political life in the Republic of Bulgaria is based on the principle of political pluralism and no political party or ideology could be stated or confirmed as a state one.

Bulgaria joined NATO on March 29, 2004 and signed the Treaty of Accession on 25 April 2005. The country has been a member of the United Nations since 1955, and is a founding member of the Organization for Security and Co-operation in Europe (OSCE). As a Consultative Party to the Antarctic Treaty, Bulgaria takes part in the governing of the territories situated south of 60° south latitude.

Opening the negotiations for accession in the European Union in December 1999 and following the recommendation of the European Commission in its 26 September Monitoring Report and the ratification of the Accession Treaties by the national parliaments of the EU-25 states, Bulgaria, together with Romania, became the 26th and 27th members of the European Union in 1st of January 2007. This is a historic landmark in Bulgaria's protracted and uneven transition towards becoming fully fledged market economy.

6.1.2 Ethnic and language distribution

According to the Constitution of the Republic of Bulgaria, Bulgarian is the official language in the country. The study and speak of the Bulgarian language is a right and an obligation of every Bulgarian citizen. Citizens whose mother tongue is not Bulgarian have the right to study and speak their own language alongside the compulsory study of the Bulgarian language.

The March 2001 census⁴⁷ (National Statistical Institute of Bulgaria (NSI), retrieved July 31, 2006) shows that 83.6% of the population identified themselves as Bulgarian, and 9.5% as Turkish. Only 2 720 people considered themselves Macedonian; this is about 0.3%. However, “the Macedonian Question” has historically been one of the most contentious issues in the Balkans, and successive censuses have given conflicting figures. As for Roma, the official and unofficial figures vary widely, from 4.6% (2001 census figure) to about 9%. Officially, there are 367 000 Roma in Bulgaria, however the actual number appears to be at least 550 000 or even higher. This discrepancy is often due to some reluctance among Roma and especially among males, to identify themselves as such, because of social stigma and barriers to employment that this often creates (NSI, 2006).

With regard to religion, the traditional religion in Bulgaria is Eastern Orthodox Christianity, which reflects its cultural and historical role and importance for the Bulgarian state, as well as its importance for social life. According to Art. 13 of the Constitution of the Republic of Bulgaria, practicing of any religion is free. Religious institutions and communities that should be separate from the state and religious beliefs should not be used for political ends. According to Art. 37, the freedom of conscience, the freedom of thought and the choice of religion and of religious or atheistic views shall be inviolable. The state

⁴⁷ A census is the process of obtaining information about every member of a population (not necessarily a human population). The term is mostly used in connection with national 'Population and housing censuses' to be taken every 10 years according to United Nations recommendations (Oxford Advanced Learner's Dictionary seventh edition, 2005, UK., Oxford University Press).

shall assist the maintenance of tolerance and respect among the believers from different denominations, and among believers and non-believers.

According to the 2001 census of the population, in which the religious denomination was viewed as "*historically determined belonging of the person or his parents or his ancestors to a certain group with specific religious views*", the Eastern Orthodox Christians are the predominant majority in Bulgaria – 6 552 751 people, representing the 82.6% of the country's population. The second most popular religion are the Muslims totaled 966 978 people, i.e. the 12.2% of the total population, followed by the Catholics with 43 811 people which represents the 0.6%. In contrast to Catholics, who have been decreasing in the last decade, the number of Protestants increased arising to the 0.5% of the country's population. Finally, there are also very small communities of people belonging to other religions, such as Judaic and Armenian Gregorian, Dunov's followers (the White Brotherhood), Buddhists, Krishna followers, Baha'i followers and Luteranians (NSI, 2006).

6.1.3 Recent Politics of Bulgaria

Georgi Parvanov, the President of Bulgaria since 22 January 2002, was re-elected on 29 October 2006 and began his second term in office in January 2007. Bulgarian presidents are directly elected for a five-year term with the right to one re-election. The president serves as the head of state and commander in chief of the armed forces. He is also the head of the Consultative Council for National Security and, while unable to initiate legislation other than Constitutional amendments, the President can return a bill for further debate, although the parliament can override the President's veto by vote of a majority of all Parliament members.

The Council of Ministers is chaired by the Prime Minister (Sergey Stanishev since 18 August 2005); it is the principal body of the Executive Branch and presently consists of 20 ministers. The Prime Minister is usually nominated by the largest parliamentary group, and is given a mandate by the President to form a cabinet.

The current governmental coalition is made up of the Bulgarian Socialist Party (BSP), National Movement Simeon II (NMS) and the Movement for Rights and Freedoms (representing mainly the Turkish minority).

The Bulgarian unicameral parliament, the National Assembly or Narodno Sabranie (Народно събрание), consists of 240 deputies who are elected for four-year terms by popular vote. The votes are for party or coalition lists of candidates for each of the 28 administrative divisions. A party or coalition must garner a minimum of 4% of the vote in order to enter parliament. Parliament is responsible for enactment of laws, approval of the budget, scheduling of presidential elections, selection and dismissal of the Prime Minister and other ministers, declaration of war, deployment of troops outside of Bulgaria, and ratification of international treaties and agreements.

The Bulgarian judicial system consists of regional, district and appeal courts, as well as a Supreme Court of Cassation. In addition, there is a Supreme Administrative Court and a system of military courts. The Presidents of the Supreme Court of Cassation, Supreme Administrative Court and the Prosecutor General are elected by a qualified majority of two-thirds from all the members of the Supreme Judicial Council and are appointed by the President of the Republic. The Supreme Judicial Council is in charge of the self-administration and organization of the Judiciary.

The Constitutional Court is in charge of reviewing the constitutionality of laws and statutes brought before it, as well as the compliance of these laws with international treaties that the Government has signed. The Parliament elects the twelve members of the Constitutional Court who serve a nine-year term by a two-thirds majority.

6.2 SOCIOECONOMIC FRAMEWORK

The following two sections (6.2.1 and 6.2.2) present the demographic and economic situation in Bulgaria, significant to analyze for understanding the new emerging needs and changes required in the education sector.

6.2.1 *Demographic Situation*

Bulgaria has had the slowest population growth of any country in the world since 1950⁴⁸. The population in Bulgaria has been constantly decreasing since 1990 (National Statistic Institute, 2003). While in 1990 it was 8 669 269, in 2001 it decreased to 7 891 095 and in 2006 it further decreased to 7 679 290. Women are increasingly more than men in the overall number of population, representing the 51.4% of the total population. In 2002, the men to women ratio was 1,000 to 1,056, while in 1990 the number of women in that ratio was 1,030. The number of women in the higher age group is higher, while in the lower age group – to 40 years of age, the number of men is higher. As of 2003, almost the double of population lives in cities compared to this living in villages: 5 441.7 people which represents the 69.8% of the country's population live in cities, while 2 359.6 people, the 30.2% live in villages⁴⁹ (see table 6.1).

⁴⁸ except Saint Kitts and Nevis due to their high emigration rate.

⁴⁹ Around 147 000 migrations took place in 2002 within the county and 128 000 people took part in them. In 2003, close to 158 000 migrations took place, into which 152 000 people took part. The domestic migration was 2.7% in 2001, 1.9% in 2002, while in 1995 it was 2.3%. The greatest movement is along the "city-to-city" direction – 46.0% of migrants have changed their residence from one city to another city in 2002, compared to 41% in 2003. The migrants' flows along the "village-to-city" and "city-to-village" directions have the least relative share – 23% for 2002 and 18% for 2003, and 20% for 2002 and 31% for 2003, respectively. Because of this, the city population has increased at the expense of village population. Migration between villages was not so much expressed – from all migrants in 2002, 11% were along the "village-to-village" direction, compared to 10% in 2003 (Eurydice, 2003d).

TABLE 6.1 POPULATION BY SEX AND YEARS, 2006

Years	Total*	Males	Females
1990	8 669 269	4 269 998	4 399 271
1995	8 384 715	4 103 368	4 281 347
2000	8 149 468	3 967 423	4 182 045
2001	7 891 095	3 841 163	4 049 932
2002	7 845 841	3 816 162	4 029 679
2003	7 801 273	3 790 840	4 010 433
2004	7 761 049	3 767 610	3 993 439
2005	7 718 750	3 743 327	3 975 423
2006	7 679 290	3 720 932	3 958 358

Source: National Statistical Institute, 2006

*NB: The number of population is influenced by external migration, which there is not taken into account.

The natural growth ratio per 1 000 people increased from -0.4% in 1990 to -5.0% in 1995 and reached -5.8% in 2002 (see table 6.2). The difference between the values of the natural growth ratio in the cities and the villages is very big. In villages it is -1%, while in the cities it is -3.0%.

In Europe, Estonia, Lithuania, Hungary and Romania have a negative natural increase rate, but with rather lower values to the one in Bulgaria. In Latvia the negative natural increase is near to the one in Bulgaria (-4.9‰). All other countries have a positive natural increase rate with values from 0.2‰ in Portugal and Slovakia to about 4.0‰ in Luxembourg and France. The highest positive natural increase rate registered in Ireland (8.1‰).

TABLE 6.2 CRUDE BIRTH RATE AND NATURAL GROWTH OF POPULATION, 1990-2006

Years	Crude birth rate ‰	Natural increase ‰	Total fertility rate *
1990	12.1	-0.4	1.81
1995	8.6	-5.0	1.23
2000	9.0	-5.1	1.27
2001	8.6	-5.6	1.24
2002	8.5	-5.8	1.21
2003	8.6	-5.7	1.23
2004	9.0	-5.2	1.29
2005	9.2	-5.4	1.31
2006	9.6	-5.1	1.38

Source: National Statistical Institute, 2006

*NB: The average number of children, whom a mother would give birth to during her entire fertility period.

While the decline in the population has been mainly due to emigration, it is also because of the increase in the number of deaths compared to births during this period. Death rate has increased by 1.8% compared to 1990, and by 0.7% points compared to 1995. In the last 20 years, the highest death rate was in 1997, when it reached the 14.7% of the whole population. Death rate is higher among men, compared to women, and in the villages compared to cities (see table 6.3).

TABLE 6.3 CRUDE DEATH RATE, INFANT MORTALITY AND PREMATURE MORTALITY RATE

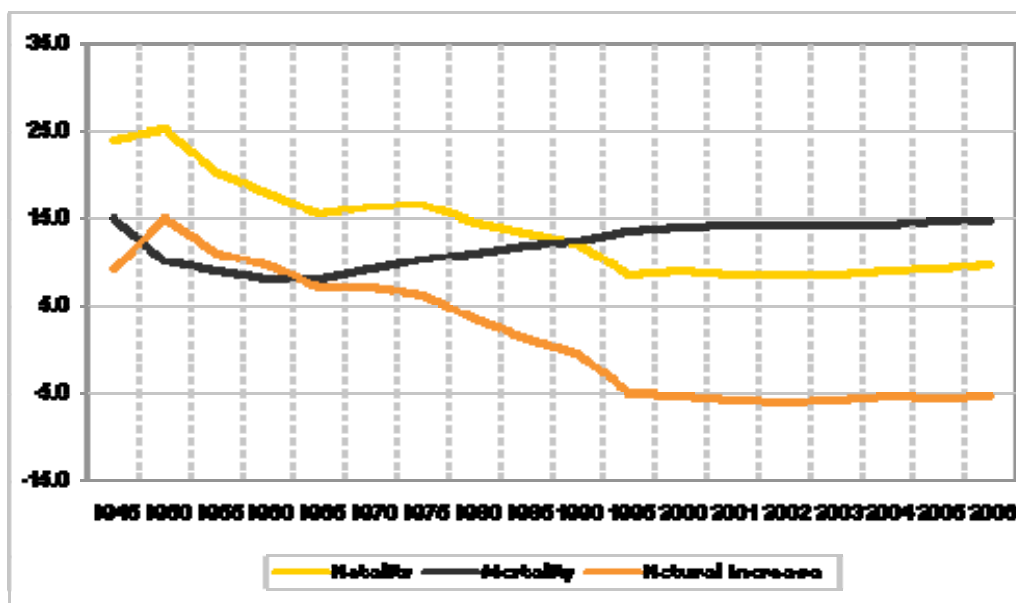
Years	Crude death rate ‰	Infant mortality rate * ‰	Premature mortality rate ⁶ %
1990	12.5	14.8	29.7
1995	13.6	14.8	28.3
2000	14.1	13.3	25.0
2001	14.2	14.4	25.2
2002	14.3	13.3	24.5
2003	14.3	12.3	24.3
2004	14.2	11.6	24.9
2005	14.6	10.4	24.6
2006	14.7	9.7	24.6

Source: National Statistical Institute, 2006

*NB: Number of dead children at the age below 1 year per 1 000 live-born children.

In the same time that the death rates have been increased, birth rates are constantly decreasing. The tendency of decreasing the birth rate has started since 1950, when it was 25.2 live born per 1 000 people of the total population. In the following decades, it has been constantly decreasing to reach 12.1‰ in 1990, 9.0‰ in 2000 and 8.5 ‰ in 2002 and 9.6‰ in 2006 (see table 6.2 and figure 6.2).

FIGURE 6.2 NATALITY, MORTALITY AND NATURAL INCREASE PER 1 000 POPULATION



Source: National Statistical Institute, 2006 found in www.nsi.bg

During the 2006, 74 495 children were born in Bulgaria, of which 73 978 (99.3%) were live-born. Compared to the preceding year the number of live-born children has increased by 2 903. The crude birth rate (the number of live-born children per 1 000 persons of the average annual population) reaches - 9.6‰. In 2006, the number of live-born boys was 38 108 and the number of live-born girls was 35 870, or there were 1 000 boys to 941 girls. The number of live-born children in cities was 55 043, and in villages was 18 935 children, or the crude birth rate was 10.1‰ in cities and 8.3‰ in villages (NSI, 2006).

The natality in Bulgaria is already at the level of the natality in number of Europe countries as Italy, Greece, Hungary, Austria, Poland and Switzerland. Germany, Latvia, Lithuania and Slovenia have a lower natality - about and under 9.0‰. In most European countries, the crude birth rate is above 10‰. Ireland and France have the highest birth rate in Europe, respectively - 14.7‰ and 12.9‰ (Eurostat, 2005).

Significant changes in the age structure of population, related to the unfavourable trends in the demographic processes development, were observed in the 1990-2006 period. The ongoing process of population aging is plunging, with the number and relative share of people aged below 15 constantly decreasing and this of people aged above 65 constantly increasing. While in 1990, the relative share of young people aged below the age of 15 was 21.6%, and this of the persons aged above 65 was 22.9% of the total population, in 1995 those shares were 19.1% and 24.3% respectively, and in 2006, the relative share of young people was 14.6%, while this of old people were 22.6% of the total population (see table 6.4 and figure 6.3).

A stable tendency of decrease is observed among the population below active age. In July 2007, the active population represents the 68.7% (Central Intelligence Agency, 2007) being increased by 13.2% compared to 1990 when it was 55.5%. In the same year, the population below active age is 13.9% being decreased by 7.7% compared to 1990 when it was 21.6% (see table 6.4 and figure 6.3). This decrease is due not only to natural attrition (to the increase of death rates to which we have referred above), but also to the change of the retirement age and the transfer of this part to the active population (NSI, 2007).

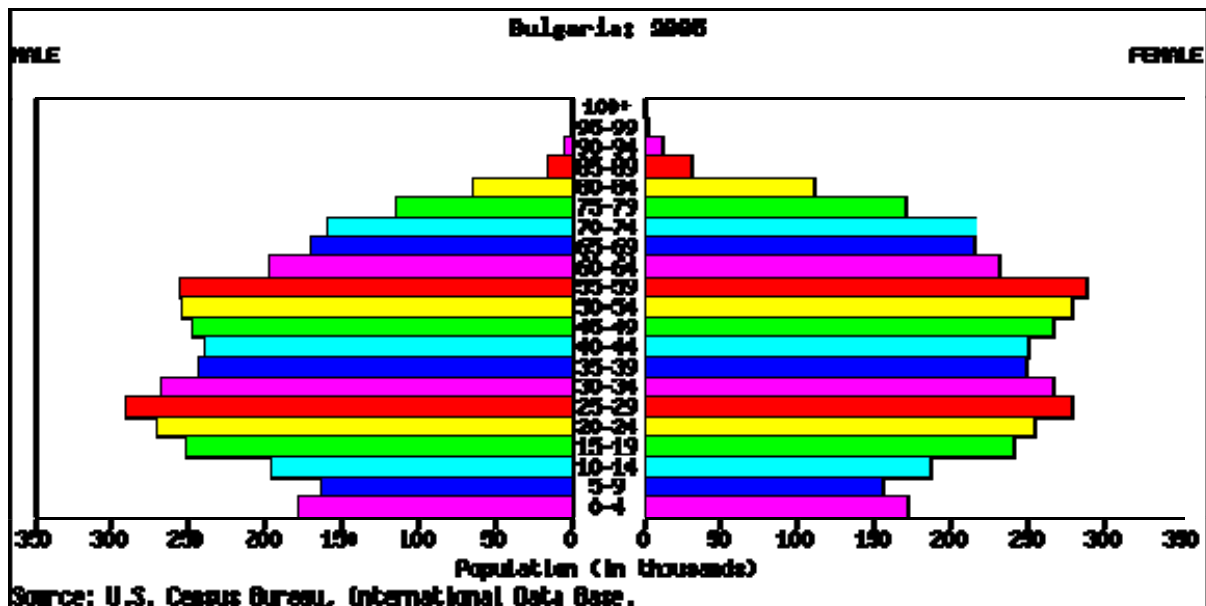
TABLE 6.4 POPULATION BELOW, IN AND ABOVE ACTIVE AGE

Years	Total	Working - age status		
		Under working age %	At working age %	Over working age %
1990	100	21.6	55.5	22.9
1995	100	19.1	56.6	24.3
2000	100	16.8	58.3	24.9
2001	100	16.3	59.2	24.5
2002	100	15.9	60.1	24.0
2003	100	15.5	60.8	23.7
2004	100	15.1	61.6	23.3
2005	100	14.8	62.4	22.8
2006*	100	14.6	62.8	22.6
2007	100	13.9	68.7	17.4

Sources: National Statistical Institute, 2007 and World Factbook, 2007

*NB: In 2006 the population at working age includes the persons aged 16 years until the completion of 63 years for men and 16 years until the completion of 58 years and six months for women.

FIGURE 6.3 POPULATION PYRAMID



The aging of population leads to an increase of the average age of population, which from 37.5 years in 1990 rose to 38.9 years in 1995 and reached 44.3 years in 2006; showing an average age of population higher in villages (63.8 years) than in the cities (37.5 years).

In the last 10 years, the average length of life increased from 70.91 years for the 1992-94 period to 72.6 years in the period of 2004-06. As of 2006, women's length of life is by more than seven years higher (76.3 years) than the one of men (69.1 years). The average length of life is 73.0 years among city population and 71.5 years among the population of villages (see table 6.5a and 6.5b).

TABLE 6. 5A MAIN DEMOGRAPHIC INDICES, 2002-2004

Indicators	2002			2003			2004		
	Total	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural
Population density per sq. km.	70.7	.	.	70.3	.	.	69.9	.	.
Natural increase - ‰	-5.8	-3.0	-12.5	-5.7	-2.9	-12.2	-5.2	-2.6	-11.1
Sex ratio (women per 1000 men)	1056	1069	1027	1058	1072	1026	1060	1075	1026
Residence structure - ‰	100.0	69.6	30.4	100.0	69.8	30.2	100.0	70.0	30.0
Age dependency ratio - ‰	46.2	39.1	65.4	45.5	38.5	64.6	44.9	37.9	64.3
Crude birth rate - ‰	8.5	8.7	7.8	8.6	8.9	7.9	9.0	9.3	8.3
Total fertility rate	1.21	1.13	1.50	1.23	1.15	1.53	1.29	1.19	1.60
Crude death rate - ‰	14.3	11.7	20.3	14.3	11.8	20.1	14.2	11.9	19.4
Male	15.7	13.0	21.7	15.8	13.2	21.7	15.7	13.3	21.1
Female	13.0	10.4	19.0	12.9	10.6	18.5	12.7	10.6	17.7
Infant mortality - ‰	13.3	12.0	16.9	12.3	10.7	16.5	11.6	10.2	15.3
Life expectancy (years)	*71.9	72.3	70.7	**72.1	72.5	71.0	***72.4	72.7	71.4
Male	68.5	69.0	67.3	68.7	69.1	67.5	68.9	69.3	67.9
Female	75.4	75.8	74.5	75.6	75.9	74.9	76.0	76.2	75.4
Crude marriage rate - ‰	3.7	4.2	2.6	3.9	4.5	2.6	4.0	4.6	2.6
Crude divorce rate - ‰	1.3	1.6	0.7	1.5	1.8	0.9	1.9	2.2	1.2
Mean age (years):									
Of population	40.6	38.8	44.7	40.8	39.1	44.9	41.0	39.3	45.0
Of mother at:									
First birth	24.0	24.6	22.0	24.3	25.0	22.2	24.5	25.2	22.4
Birth	25.3	25.9	24.0	25.6	26.2	24.2	25.8	26.4	24.3
At first marriage									
Male	28.1	28.3	27.2	28.4	28.7	27.3	28.8	29.1	27.5
Female	24.8	25.1	23.7	25.2	25.5	23.9	25.5	25.9	24.1
At divorce									
Male	39.4	39.4	39.6	39.8	39.6	40.3	40.6	40.5	41.3
Female	36.0	36.0	35.8	36.3	36.2	36.6	37.2	37.1	37.6

*) Data are for the period 2000 – 2002

**) Data are for the period 2001 – 2003

***) Data are for the period 2002 - 2004

Source: National Statistical Institute, 2005

TABLE 6.5B MAIN DEMOGRAPHIC INDICES, 2004-2006

Indicators	2004			2005			2006		
	Total	Urban	Rural	Total	Urban	Rural	Total	Urban	Rural
Population density per sq. km.	69.9	.	.	69.5	.	.	69.3	.	.
Natural increase - ‰	-5.2	-2.6	-11.1	-5.4	-2.4	-12.7	-5.1	-2.1	-12.4
Sex ratio (women per 1000 men)	1 060	1 075	1 026	1 062	1 077	1 028	1 064	1 078	1 030
Residence structure - %	100.0	70.0	30.0	100.0	70.2	29.8	100.0	70.6	29.4
Age dependency ratio - %	44.9	37.9	64.3	44.5	37.5	64.0	44.3	37.5	63.8
Crude birth rate - ‰	9.0	9.3	8.3	9.2	9.6	8.1	9.6	10.1	8.3
Total fertility rate	1.29	1.19	1.61	1.31	1.24	1.56	1.38	1.31	1.60
Crude death rate - ‰	14.2	11.9	19.4	14.6	12.0	20.8	14.7	12.2	20.7
Male	15.7	13.3	21.1	16.2	13.5	22.4	16.2	13.6	22.3
Female	12.7	10.6	17.7	13.2	10.7	19.2	13.3	11.0	19.2
Infant mortality - ‰	11.6	10.2	15.3	10.4	8.9	14.6	9.7	8.6	13.1
Life expectancy at birth (years)	*72.4	72.8	71.4	**72.6	72.9	71.6	***72.6	73.0	71.5
Male	69.1	69.5	67.9	69.0	69.3	68.1	69.1	69.4	67.9
Female	76.2	76.5	75.8	76.3	76.6	75.7	76.3	76.5	75.6
Crude marriage rate - ‰	4.0	4.6	2.6	4.3	4.9	3.0	4.3	4.8	2.9
Crude divorce rate - ‰	1.9	2.2	1.2	1.9	2.2	1.2	1.9	2.2	1.2
Mean age (years):									
Of population	41.0	39.3	45.0	41.2	39.5	45.2	41.4	39.7	45.3
Of mother at:									
First birth	24.5	25.2	22.4	24.8	25.6	22.5	25.2	25.9	22.7
Birth	25.8	26.4	24.3	26.2	26.8	24.4	26.4	27.0	24.5
At first marriage									
Male	28.8	29.1	27.5	29.1	29.4	28.0	29.3	29.6	28.1
Female	25.5	25.9	24.1	25.8	26.2	24.5	25.9	26.3	24.5
At divorce									
Male	40.6	40.5	41.3	41.1	40.8	42.1	41.3	41.1	41.9
Female	37.2	37.1	37.6	37.6	37.4	38.4	37.7	37.6	38.3

*) Data are for the period 2002 - 2004

**) Data are for the period 2003 - 2005

***) Data are for the period 2004 - 2006

Source: National Statistical Institute, 2007

6.2.2 *Economy and labor market*

The transition period from centralized planned economy to market economy turned out extremely difficult in Bulgaria. In the beginning of the transition period, Bulgarian economy was characterized by a misbalance and ambiguity, which together with the delay of the political and economic reforms predetermined the unsteady progress of the country. In 1997, the inflation reached 506% (Eurydice, 2003d). However, it has been noted a gradual improvement of the national economy: in the last years inflation is within the frames and no deficit has been accounted since 1998.

The annual “Index of Economic Freedom” published by the Wall Street Journal ranks 155 of the world's economies according to 50 economic variables in 10 broad categories: banking and finance; capital flows and foreign investment; monetary policy; wage and price policy; government intervention in the economy; government regulation; and black markets. The conclusion drawn from these annual studies is that “*the difference between poverty and prosperity is economic freedom*”, in particular freedom from over-regulation, hyper-inflation, and high spending on public (government) employment. North America and Europe are the most economically free regions and the richest. The 2000 ranking showed Bulgaria in the 95th place (Hong Kong is 1st, the US and Luxembourg are 5th, Estonia and Denmark 14th, Romania 124th, Russia 127th, and Belarus 146th). Considering the deep crisis of 1997, this is an impressive endorsement of Bulgaria's economic policies since then (Wall Street Journal, 2000).

The prospects of joining the EU club constituted a solid external anchor for the transformation of the country, placing Bulgaria on a steady path of converging in income, competitiveness and living standards towards the EU. Celebrated with enthusiasm on the streets of Sofia on New Year's Eve, accession to the EU is nevertheless, neither the beginning nor the end of the integration process. The unfinished reforms agenda remains considerable and the structural adjustment of the country needs to continue, especially in the areas of governance and market regulation.

Economic growth has been robust in recent years, driven by productivity gains, innovation, a better allocation of resources, and, occasionally, excess demand. The GDP of Bulgaria for

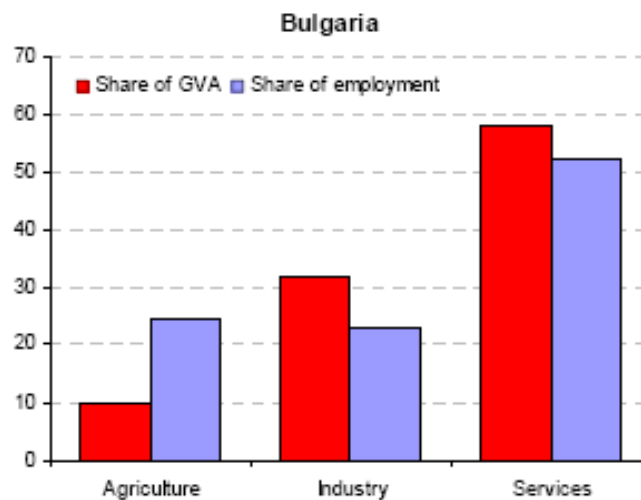
2000 stood at 69.6% of its 1989 base; this represents an increase in real GDP growth of 5.8% over the 1999 figure (see table 6.2). However, DGP per capita still remains low in comparison to the other EU 25 member states (see figures 6.5 and 6.6). Inflation has largely been controlled after the hyperinflation of 1996-97 and the consequent revaluation, with inflation for the year 2000 being 11.4% (see table 6.6).

TABLE 6.6 MACRO-ECONOMIC DEVELOPMENTS, 1992-2000

Year	Consumer Price Index inflation (% change)	Budget balance as % of GDP	Real GDP growth (% change)	Unemployment rate (%)	Privatisation revenue (as % of GDP)
1992	79.2	-2.9	-7.3	15.3	
1993	63.9	-8.7	-1.5	16.4	0.4
1994	121.9	-3.9	1.8	12.8	1.5
1995	32.9	-6.3	2.1	11.1	0.9
1996	310.8	-12.7	-10.1	12.5	2.9
1997	578.6	-2.5	-7.0	13.7	5.6
1998	1.0	1.5	3.5	12.2	5.3
1999	6.2	-1.0	2.4	15.9	
2000	11.4	-1.5	5.8	18.0	

Source: European Bank for Reconstruction and Development, Transition Report, various years; Bulgarian National Bank, Annual Report, various years.

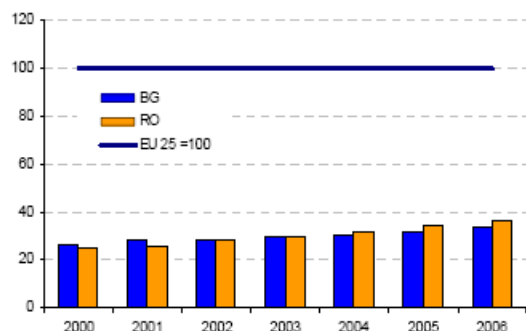
In 2003, the individual economy sector shares in the country's GDP – about 56% services, 24% industry and 10% agriculture - have outlined a typically market profile of the Bulgarian economy. The number of private companies increased significantly; the banking sector was fully privatised after the crisis of 1997 and stabilized so far; the positions of the country as a reliable counterpart were strengthened and foreign investments began to be attracted (see figure 6.4).

FIGURE 6.4 STRUCTURE OF GVA⁵⁰ AND EMPLOYMENT, 2005

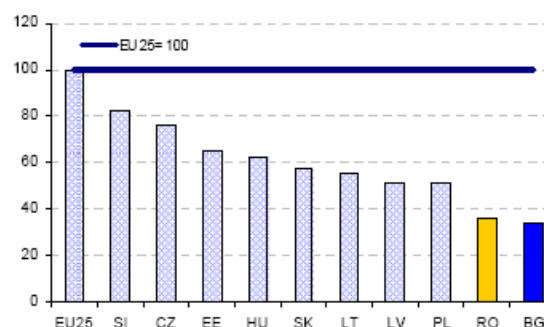
Source: Eurostat, 2005

However, the gap remains large. The share of the agricultural sector remains unsustainably high, while employment in services is substantially below the EU average. Disparities between the urban and the large rural sectors, as well as between regions, are widening. As we have already seen, around 30% of Bulgaria's population lives in rural areas. Poverty remains high and the pick up in economic activity has failed to filter through to important social groups. The gradual opening of EU-25 labor markets to the workforce from Bulgaria is likely to widen the mismatch between supply and demand in segments of the labor market in the country and augment wage pressures (see Figures 6.7 and 6.8).

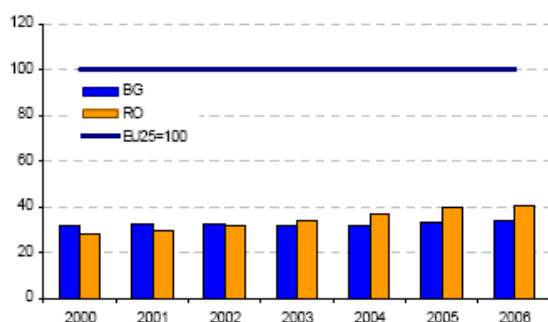
⁵⁰ Gross Value Added (GVA) is a measure of the value of the goods and services produced in the economy (source: ECN02/06).

FIGURE 6.5 GDP PER CAPITA (% OF EU25)

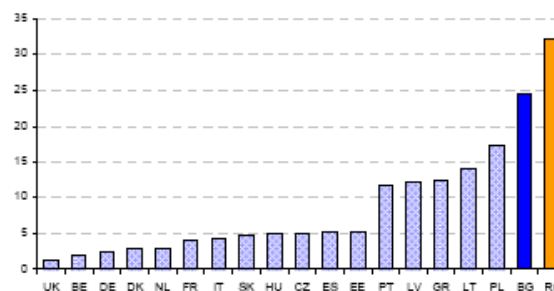
Source: Eurostat 2006, found in World Bank, 2007c

FIGURE 6.6 GDP PER CAPITA (PPS, 2006)

Source: Eurostat forecast 2006, found in World Bank, 2007c

FIGURE 6.7 LABOR PRODUCTIVITY (% OF EU25)

Source: Eurostat 2006, found in World Bank, 2007c

FIGURE 6.8 EMPLOYMENT IN AGRICULTURE (% OF TOTAL EMPLOYMENT)

Source: CSOs 2006, found in World Bank, 2007c

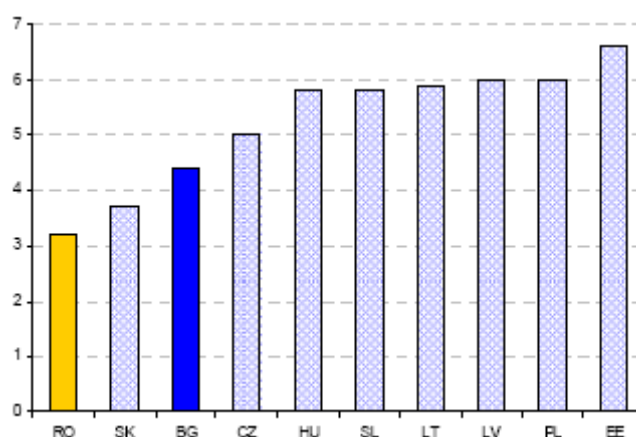
The macroeconomic policy framework and outcomes have improved substantially in recent years, but vulnerabilities remain. Core inflation has been rising recently in Bulgaria, and the conduct of fiscal policy has generally been prudent. At the same time, external imbalances have widened, and Bulgaria runs large current account deficits, fuelled by strong credit growth to the private sector. A central dilemma for policymaking over the coming years will be how to reconcile the need to further consolidate macroeconomic stability with the need to implement the substantial *acquis* commitments, especially in infrastructure and environment.

The consolidation of the governance and institutional framework is slower than expected and represents a main cause of concern for the EU. Progress in strengthening the justice

system and fighting corruption is limited. Modernizing the public sector and reforming public administration, require additional sustained effort. The education, health and social protection systems, in particular, require attention (World Bank, 2007c).

The attention dedicated to human capital development remains limited (see figure 6.9). To maintain productivity growth, enhance competitiveness, and address skills mismatches, Bulgaria would need to invest more, and more effectively, in building, maintaining and protecting their human capital pool in a fiscally sustainable manner. Improving the efficiency and efficacy of spending on education and health by dealing with the overcapacity in the sectors and focusing on the quality of outputs should be seen as a priority of the public sector modernization agenda. Bulgaria, together with Romania score low on the Human Development Index (HDI). Bulgaria has a HDI of 0.81, while Romania scores 0.80, well behind other member states that Joined EU in May 2004: the Czech Rep. (0.88), Hungary (0.87) or Poland (0.86). The quality of education needs improvement, as the outcome indicators of educational achievement are lower than those of the OECD and other EU members. Most health indicators are also poorer, or significantly poorer, than EU averages and life expectancy at birth is among the lowest in Europe.

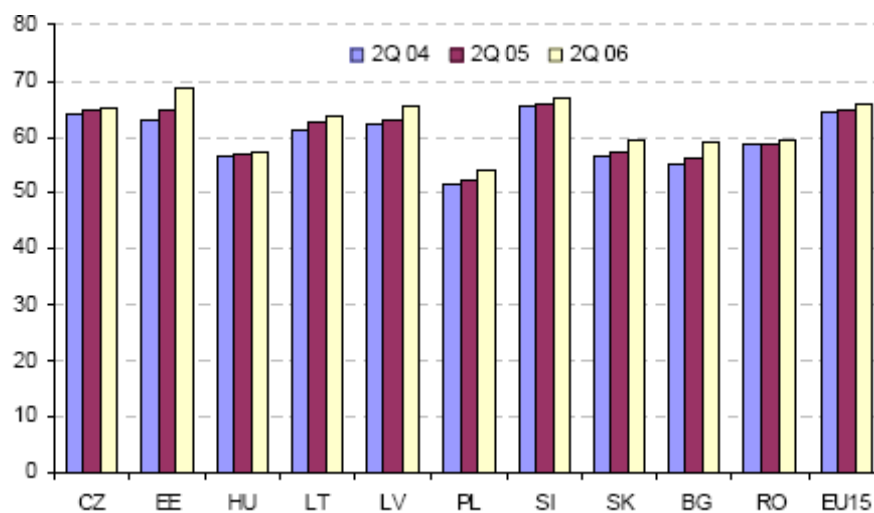
FIGURE 6.9 GOVERNMENT EXPENDITURE ON EDUCATION (% OF GDP, 2004)



Source: Eurostat; BG, RO national sources 2005, found in World Bank, 2007c

Employment rates⁵¹ have been increasing in Bulgaria at a solid pace alike in other countries in the region, notably in the Baltic States and Poland⁵². However, labor participation and employment in Bulgaria are still well below the EU-15 (see figure 6.10).

FIGURE 6.10 EMPLOYMENT RATES, 15-64 (LFS, %)

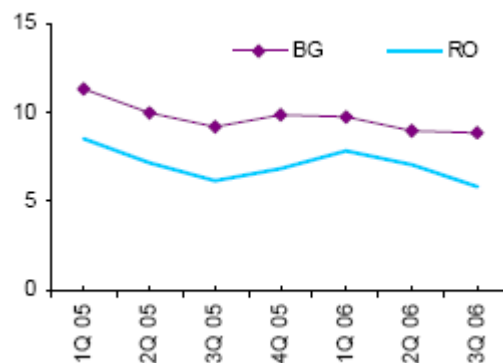


Source: Eurostat 2006, found in World Bank, 2007c

The increase in employment has been associated with a decline in unemployment rates in Bulgaria (see Figure 6.11).

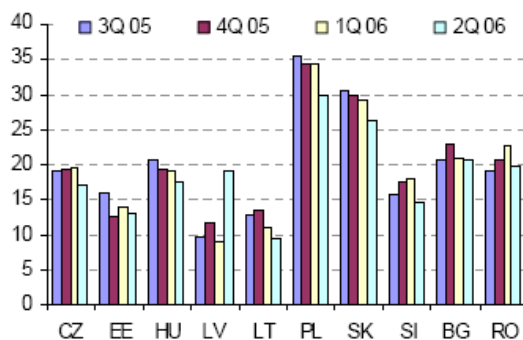
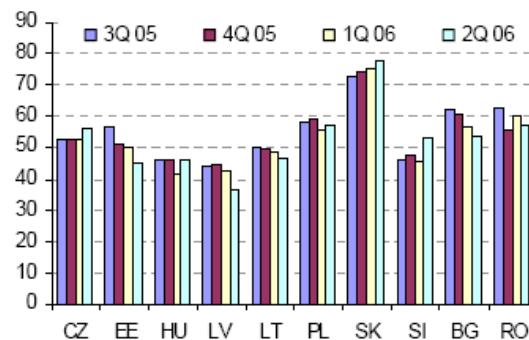
⁵¹ The minimum age for employment in Bulgaria is 16. Exemptions may be made for 14-15 year olds working in certain professions (e.g. artists). Youngsters under 18 are protected by provisions limiting their working hours and ensuring certain conditions related to safety and training.

⁵² The only exception to this positive trend is Hungary and Romania, where the employment rate has stayed almost flat for four consecutive quarters.

FIGURE 6.11 UNEMPLOYMENT RATE (LFS, %)

Source: CSOs 2006, found in World Bank, 2007c

Unemployment has fallen by more than the increase in employment under the influence of external immigration. The number of young and long term unemployed is declining, although the latter still exceeds 50% being quite high in comparison to the other EU member states (see figures 6.12 and 6.13).

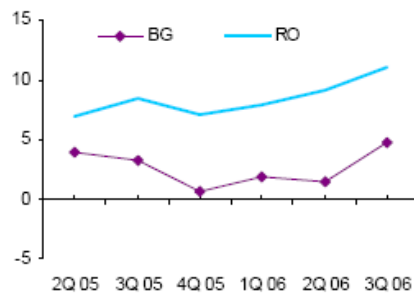
FIGURE 6.12 YOUTH UNEMPLOYMENT RATE (15-24 YEAR OLDS, %)**FIGURE 6.13 LONG-TERM UNEMPLOYMENT (% OF TOTAL UNEMPLOYMENT)**

Source: Eurostat 2006, found in World Bank, 2007c

Bulgaria together with Croatia, Slovenia and Poland is ranked at first top positions among former transition countries for youth unemployment. For 2001, unemployment stood at 17.5%, slightly lower from its 2000 level (18%). Employment patterns have changed considerably since 1996, with a sharp decrease in employment in primary and secondary industries, especially agriculture, forestry and fishing, and an increase in service-based industries. Manufacturing is still the largest employer with 25% of employees, followed by “trade and repairing activities” at 15% and agriculture, forestry and fishing at 9.2% (see table 6.5).

Labor and skills shortages are increasingly visible in segments of the labor markets, including manufacturing, construction and selected areas in services. This reflects not only the rapid expansion of the sectors, but also adverse demographic trends and labor migration to the EU-15 area. Informal emigration from Bulgaria to Spain or Italy appears large, raising some concerns about labor shortages in the sending country. These are likely to be exacerbated in the future as EU integration deepens and access to the labor markets of the other member countries is gradually liberalized.

The increasing mismatch between labor demand and supply has exacerbated wage pressures. The decline in unemployment, but also strong productivity gains, has led to the acceleration of wage growth. Bulgaria real wage growth remains moderate and below productivity growth except perhaps in sectors suffering from chronic labor shortages such as construction and high-skilled services. The growth in unit labor costs in industry has declined to around zero (see Figure 6.14).

FIGURE 6.14 REAL WAGE GROWTH (% YOY)

Source: CSOs 2006, found in World Bank, 2007c

The data presented in this chapter is significant for our study because it reveals that the education reform undertaken in Bulgaria took place within the framework of several socio-economic changes occurred in the country the last decade. Knowing the economic and the labor market situation in the country is highly relevant to our study as it can help us to understand the context within which the educational system is being reformed and the challenges and needs to which it needs to respond. These topics will be discussed in the following two chapters: 7 and 8.

CHAPTER 7. BULGARIAN SECONDARY EDUCATION SYSTEM: HISTORICAL OVERVIEW

7.1 INSTITUTIONAL AND LEGAL FRAMEWORK BEFORE 1989

7.1.1 Origins of Bulgarian education system

The Bulgarian educational system has its deep roots and rich history. Bulgarian people have established and preserved deep-seated and intransient educational traditions throughout their 13-century existence as a state. They have maintained and developed the Cyrillic alphabet - created by the Cyril and Methodius brothers as early as the 9th century- and reached the "golden age of Bulgarian literature and culture" in the 10th century, when Kliment Ohridski established the first Bulgarian school. Bulgarian people have preserved their love of learning and education through the years of the Ottoman rule. "Cell schools" were established in the 18th and 19th centuries, being either monastery schools or public schools. The nature of the former was predominantly religious, while the latter provided pupils with secular knowledge, teaching how to read and write. These schools were known as monastery, church or cell, because teaching was carried out more often in the monks' cells. Later, schools established by patriotic Bulgarians, mainly craftsmen and educated people. Some of those schools developed into handcraft schools, where pupils went through a long training process – the stages of apprentice, journeyman and master. Progression from one stage to the next one was achieved by taking a demanding examination, conducted by craftsman recognized in the guild, publicly acknowledged and respected (Georgeoff, 1977).

Public schools were established on a larger scale at the end of the 18th century, and especially in the 30s and 40s of the 19th century, known as "new Bulgarian" schools. Those schools were established and maintained by educated patriotic Bulgarians associated in school Boards of Trustees. In those schools, conditions for progressive education were created, since a great part of the teachers had been graduated from schools in the then developed European countries. It was the time when the Bulgarian National Revival was

developed, a movement for enlightenment and for incorporation of Bulgarian people into the European and Christian civilization. At the end of the school year, the Board of Trustees was organizing a public examination to assess pupils' training, conducted in the presence of both parents and the public (Eurydice, 2003d).

The state educational system was established after 1878 -which is also the time when the first school laws are dated, i.e. immediately after the Liberation of Bulgaria from the Turkish rule- and retained its basic structure through 1989. The first law, "Provisional Bylaws of Public Community Centres", was adopted on 29 August 1878. This law approved three degrees of public schools: primary; secondary or two-class; and main or four-class. It specified the subjects to be studied, the course of study, the management and financing by stage. A distinctive characteristic of this first law was that primary education became compulsory for both sexes.

The period 1878–1921 was characterized by rapid development of school legislation and adoption of a number of laws such as: Elementary education Act in Eastern Roumelia (1881); Primary and Secondary Education Act (1882); Public and Private Schools Act (1885); Public Enlightenment Act (1892); Secondary Girls' Education Act (1897).

The Public Enlightenment Act (1909), adopted at the time of Minister for Education Nikola Mushanov, was of special importance for the development of national education and culture. This Act specified the main principles on which the educational system should be based:

- compulsory and free of charge elementary education;
- school training accessible to all children;
- specification of the objectives, content, organization and management of the different types and stages of schools;
- the central, district and university management; and,
- the issues concerning teaching staff, school Boards of Trustees, Supreme and District School Boards, supervisory and penal institutions.

This Act also embraced university education, private schools, as well as cultural and philanthropic organizations, national museums, libraries, community centers, the National Theatre, etc.

Twelve years later, in 1921, a new Public Enlightenment Act was adopted under the government of the Bulgarian Agricultural Union with the Minister Stoyan Omarchevski, which also played a significant role in the development of education. This Act was based on the principles laid down in the Act of 1909, but it was developed further introducing compulsory basic education, free education for all and more intensive development of secondary general education and vocational education. The Act preserved the public participation in the management of schools through the work of the Boards of Trustees (Georgeoff, 1977).

The period comprising the 30s and the 40s of the 20th century was characterized by stabilization in the educational system and its expansion into the sphere of general and vocational education.

7.1.2 Evolution of the education system

The functioning and management of education in the period of communism 1944-89 was carried out based on documents of the ruling Communist Party: laws, decrees, orders, Theses for Development of Education (1980), etc. During the communist period, the education system featured strong centralization and ideologization, but it was also during that period when secondary education was expanded and popularized.

Negative effects on the educational system were produced by mainly the strict regulation and centralization of its administration, the frequent, ill-founded and self-serving changes in its structure and governing bodies, and the educational system itself. However, within this period certain positive developments also took place, such as the popularization of the secondary education – general and vocational; the establishment and expansion of a great

number of secondary schools; the preservation of a number of democratic trends in the management of education, such as the participation of parents and community in the activities of schools (Eurydice, 2003d).

The Ministry of Culture, Science and Education was implementing the government policy by managing education in the country in terms of ideology, methodology, administrative organization and human resources. Among its functions were to:

- issue fundamental regulatory acts on education (such as curricula and study programs);
- organize the writing and publishing of textbooks and other supporting publications for educational purposes;
- determine the type of educational and instructive activities conducted in schools;
- define the recruitment procedures for teachers and set the entry requirements for students in secondary and higher education institutions (Eurydice, 2003d).

In regional level, the Municipal Councils, following the acts issued by the Government and by the Ministry of Culture, Science and Education, were responsible for the management of schools and other educational institutions (apart from higher education institutions, pre-service and in-service teacher training institutes and the secondary schools of arts).

The financing of education was mainly the responsibility of municipalities, which, in their turn, had elected the school Board of Trustees among their members. The Board of Trustees was a public body responsible for organizing and managing the established schools and assumed all the functions related to their establishment and running. District school Boards were also established and district inspectors were appointed to support and control the work of teachers.

As far as regards higher education, each higher educational institute was presided over by a rector. The rector and the deputy rectors were elected for two years from among the professors and the faculty members by a secret ballot at their general meeting. But according to the regulations for the application of the law on higher education (Ibid No 45/1958), published some months after the act itself, the Party secretaries in the higher educational institutes could take part at the electoral meeting of rectors and deputy rectors. The candidates were recommended by the academic council, the Party organization and the trade union of the respective institute.

The professors and the assistant professors were appointed by the faculty after a competitive examination.

After the seizure of power on 9 September 1944, the Bulgarian Communist Party following the Soviet pattern for the indoctrination of the youth of school age began gradually but persistently to carry out its educational policy. The schools were to become a powerful tool in the hands of the Party; a tool for teaching the Bulgarian youth the communist ideology and strengthening the relationships with the Soviet Union (Eurydice, 2003d).

Under the pretense of cleansing the cultural life of the country of all printed material imbued with the fascist spirit, on 13 October 1944 a decree ordered the confiscation of all books of a "pro-German, fascist and racial nature" as well as anti-Soviet books. This gave the impetus to a "Goebbels pattern" gradual destruction of all textbooks and school literature printed before World War II. On 19 February 1945, a decree was promulgated ordering that the publishing of school textbooks was a state monopoly.

Another decree of 3 November 1944 (Ibid No 243/1944) and the law on higher education published four years later on 24 September 1948 (Ibid No 244/1948) authorized the government to purge the schools and universities of all teaching staff, which had a "record of fascist and reactionary activities" and to replace them with persons loyal to the Fatherland Front, i.e. to the Communist Party. The decree helped the Party to fire teachers and especially professors, who did not sympathize with the Communist regime (Eurydice, 2003d).

The new constitution of People's Republic of Bulgaria adopted in 1947 declared all schools as state schools. Only by special law and state supervision were private schools allowed to exist. In effect all private schools, which had been mostly professional, were nationalized.

All foreign schools (established and supported by foreign governments, religious missions, etc.) were closed for the school year 1948/49 (Ibid No 180/1948). A law on religious denominations prohibited religious communities and churches from maintaining schools of any kind. Only theological seminaries were allowed for the training of priests and even these were only allowed after special ministerial authorization (bid No 48/1949). In 1950, it

was authorized the establishment of schools only for the Soviet diplomatic and consular officials and Soviet citizens (Ibid No 208/1950).

Complete Communist control over education was established in 1949. Practically all schools, from kindergartens to universities passed fully onto the hands of the Communist government.

The new constitution provided that the education in the country should be carried out in a democratic and progressive spirit. In spite of this provision, on 24 August 1949 a joint resolution of the Bulgarian Communist Party (BCP) and the Council of Ministers, stipulated that education was to be carried out in the spirit of socialism, based on Marxist-Leninist teaching, and in the spirit of indissoluble brotherly friendship with the Soviet Union. The resolution urged "the use of the rich experience of the Soviet Union" (Ibid No 215/1949).

A complete and blind copying of the Soviet system and the "sovietization" of the schools in Bulgaria followed the joint resolution:

- Subjects like dialectical materialism the fundamentals of Marxism-Leninism, the history of the Communist Party of the Soviet Union (CPSU) and the BCP became obligatory.
- Religious instruction was prohibited.
- The study of Russian was given predominance over the modern West European languages.
- The schooling in the gymnasium (upper secondary education) was reduced from five to four years, and thus the schooling period in the general schools of education (before entering universities) was decreased from 12 to 11 years.
- The universities lost their autonomy, and their rectors and faculty staff were placed under full Party control.
- The Bulgarian Academy of Science, the supreme scientific and scholarly institute of the country also lost its autonomy.

In pre-Communist Bulgaria, the Bulgarian Academy of Sciences comprised the most prominent representatives of all branches of Bulgarian science and letters regardless of social position, political opinion, scientific theories or philosophical schools.

The Law on the Bulgarian Academy of Sciences ("Darzhaven Vestnik" No 235/1949) published on 11 October 1949 made this institute dependent on the Council of Ministers not only administratively but also with regard to the content of its work. Art. 1 of the law provides that the Council of Ministers "approves the scientific plans of the Academy for the execution of which it is accountable every year to the Council" (MES, 1949).

According to Art. 15 of the law, "persons who have manifested or manifest fascist or other activity against the people cannot be members of the Bulgarian Academy of Sciences". In practice, this means that all anti-Communists or scientists and scholars with any independence of thought had no place in this institute.

The law (Art. 2) prescribed the task of the Academy as follows:

"The purpose of the Academy is the all-round development and the contribution to the development of the theoretical and applied sciences in the country, to study and develop the achievements of the universal, and primarily of Soviet scientific, thought in order to profit by them widely and according to plan for the building of socialism in Bulgaria" (MES, 1949).

The decree on National Education published on 9 November 1954 (MES, 1954) left no doubt on the educational line to be taken in Bulgaria. Art. 1 of the decree says that: "*Education in schools and other educational institutes is carried out in the Communist spirit*". Even the nurseries are not spared from indoctrination. For children between three and seven years kindergartens will be opened, the purpose of which is to guarantee their correct physical and spiritual development, to lay the foundation of their Communist education and to prepare them for entering school (Art.4).

In 1948, the Minister for Education, Kiril Dramaliev, before presenting his new law on education in the National Assembly said that it (the law) aimed at bringing the general education closer to actual practice, and at a faster rate of polytechnization (vocational training) so that the professional schools might bring up cadres with broader scientific, technical and political scope ("Otechestven Front" 27 August 1948).

However, until 1957, even the regime had to admit that neither the general level of education nor the results of vocational training were very encouraging for the Party. The joint Party and Government Decree on Further Development of Education in Bulgaria, issued on 5 July 1957 (MES, 1957a) admitted the existing shortcomings:

"Serious mistakes have been made which handicapped the development of the schools of general education. Certain questions on education were decided hastily. No mature consideration on different school reorganizations was at hand. The transplanting of the Soviet school experience was done mechanically. The pedagogical science was inadequately applied in schools (...) The inheritance of the positive values from the past school system was underrated (...) In the professional as well as in the higher education there are also serious shortcomings (...) The practical preparedness of the young specialists with university education is inadequate. Scientific research in the high educational institutes is lagging" (MES, 1957a).

Chervenkov was at that time Minister for Education and Culture and he admitted that out of the 16 000 to 17 000 students who graduated every year from the Bulgarian medium schools (gymnasium), only one-third were fortunate enough to be able to continue their studies in the universities. The remaining two-thirds were left to decide for themselves what to do. Chervenkov admitted that there was no abundance of jobs in Bulgaria and complained that most of the graduates were neither accustomed to, nor actually desired manual work. He added that the purely theoretical type of education was the reason why the graduates of the medium schools (gymnasium) could not freely and smoothly choose their future professions (Bulgarian Evaluation and Research, 1959).

The decree of 5 July 1957 aimed at overcoming these shortcomings, while the Closer between School and Life Act adopted in 1959, put accent on the polytechnic education and the relation between instruction and production processes. Under the provisions of the newly developed legislation, the main attention in education was shifted to finding a better link between education and the requirements of industry, collective farms and trade. The implementation of the new educational plan for the medium schools for general education

was to start in 1960, while experimental vocational training was to be introduced in a fixed number of schools at the beginning of the coming school year (1957/58). Beginning with 1957/58 school year, all teachers had to undergo vocational training.

Furthermore, more focus was given to the Communist education of the pupils, paying special attention to patriotic education. The faculties in the higher educational institutes were to oppose every underestimation of the ideological subjects and were to ensure the Communist education of the students.

The fall of Zhivkov resulted in a complete restructuring of the country's educational system. In retrospect Bulgarian educators recognized that the socialist way of educating was not only bureaucratic, boring, and impersonal; but it also led to disregard for the rights of the individual, intolerance of the opinions of others, and aggressive behavior. The centralized system with its regional hierarchies was therefore scrapped in favor of a system of educational councils in which every 400 teachers could elect a delegate to the National Council of Teachers. The first goal of the new organization was to depoliticize the schools in cooperation with the Ministry of Public Education (see chapter 8).

7.2 THE EDUCATION SYSTEM AND PROVISION UNDER COMMUNISM

Seven different types of schools provided education and training offered in Bulgaria during the communism (Georgeoff, 1977):

- a) Kindergartens offering Pre-School Education
- b) Schools for General Education
- c) Pedagogical Schools
- d) Schools offering Vocational Courses
- e) Medium Professional Schools (Technical Colleges, Vocational Schools)
- f) Unified Secondary Polytechnic Schools
- g) Higher Educational Institutes (Universities, etc)

Each of this type of school is presented below.

a) Pre-School Education -- Kindergartens

Children from three to seven years of age could attend kindergartens if such were available. Kindergartens were not compulsory, but were an absolute necessity if both parents work. The purpose of these kindergartens was, as has been said, to "*guarantee the correct physical and spiritual development*" of the children, "*to lay the foundation of their Communist education, and to prepare them for entering school*".

On 24 May 1958, the Day of Bulgarian Education and Culture, the Sofia press announced that there were 6 219 Kindergartens attended by 270 397 children in the country, claiming that this represents one half of the children in preschool age (NSI, Statistical Yearbook 1956, p. 114-115).

b) Schools for General Education

The schools for general education provided 12 grades, after the amendment of the law for education in 1957 ("Izvestia" No 90/1954, 7/1956 and 59/1957). The education in these schools was divided into basic and medium types:

- Basic - from first to seventh grade. (From first to fourth class -- elementary education and from fifth to seventh class -- progymnasium or first level secondary school). Basic education was free of charge and compulsory for all children of Bulgarian citizens from 7 to 15 years of age (Ibid No 90/1954).
- Medium Schools - from eighth to twelfth grade (medium school or gymnasium - second level secondary school).

For the ethnic minorities state schools were available where the teaching was carried in the native language of the pupils. In these schools though, the learning of Bulgarian was obligatory. In all grades of the general education schools, the system of coeducation was applied. Only unmarried students could attend the day schools for general education. This regulation did not apply to the evening schools, which provide the opportunity for workers and employees of both sexes to complete their medium education.

The students from the 4th to the 11th grades were sit an annual examination at the end of each school year. In order to graduate from the medium school (at the completion of the 12th grade) the students had to pass special examination after which they could get a diploma for graduating medium education. This diploma was required for continuing education in universities.

During the school year 1956/57 there were 6 803 schools for General Education (1st to 12th grade) with 1 129 129 students. In the medium schools alone (8th to 12th grade) there were 165 363 students (NSI, 1956, p. 114-115).

c) Pedagogical Schools

The pedagogical schools were medium schools. Their main purpose was to prepare the future teachers for elementary (first to fourth grade) schools as well as the responsible organizers and educators of the children's pioneer organizations. Students to attend these schools must have completed the basic (first to seventh grade) education.

There were also pedagogical institutes attended by the future teachers in the progymnasium (fifth to seventh grade). The course in the institutes was of two years. The graduates of these institutions could get what might be termed a semi-university education. The graduates of the pedagogical schools and institutes could continue their education in several faculties of the universities.

During the School Year 1956/57, there were 22 Pedagogical Schools with 8 989 students (NSI, 1956, p. 114-115).

d) Vocational Courses (Utchilishta za Trudovi Rezervi)

The one to two year - courses for pure vocational training were mostly given at big plants and mining centers with the sole purpose of training skilled workers for production. These courses, which were in no way connected with other sorts of schools, were divided into three groups ("Izvestia na Presidiuma na Narodnoto Sabranie" issue 34/1952):

- a) Two-year vocational courses for training skilled workers for the metallurgical industry, the mining industry and the sea and river transport services.
- b) Two-year railroad courses for training skilled workers for the railroads.
- c) One year courses for training skilled workers for the mining industry, the textile industry, metallurgical industry, forestry, etc.

The first two groups were only for boys between 14 and 17 years of age, while the third group was accessible for both girls and boys between 14 and 18 years of age.

The schools providing these types of courses were mostly boarding schools and were free of charge, supported fully by the state. The graduates were obliged to work for at least four years in the types of production assigned to them. However, these courses were gradually losing their importance. During the school year 1951/52, the pupils attending them numbered 37 703, while in 1956/57 their number decreased to 20 100 students, from which 18 415 students attended two-year Vocational Courses (*Utchilishta za Trudovi Rezervi*) offered in 114 schools and 1 685 students attended one year Vocational Courses provided by 19 available schools (Statistical Office of the United Nations, 1956, p. 115).

e) Medium Professional Schools (Technical Colleges, Vocational Schools)

In 1959, twenty-five different types of professional schools (technical colleges) existed in Bulgaria: Mechanics, electrotechnics, mining, industrial chemistry, bakery, meat processing, building industry, transport, textiles, food industry, public catering, grain collection, clothing, timber industry and architecture, shoe production, forestry, stone-cutting and masonry, agriculture, veterinarian, "green" building, geodesy, medicine, graphic, and physical education ("Izvestia" No 26/1958 and "Narodna Mladej" 15, 16, 19 June 1958).

There were day and evening professional schools. Pupils to access professional schools must have completed basic education, i.e. up to seventh grade ("Vecherni Novini" 29 April 1958). The student-workers attending professional evening schools must have at least two years of practical work. The maximum age allowed in the evening schools was 40.

The graduates of the medium professional schools (technical colleges) could be candidates for places in university faculties corresponding to their education ("Izvestia" No 26/1958). For example, a graduate of a technical college in industrial chemistry could continue to study chemistry in the university.

In the school year 1957/58, there were 154 Medium Professional Schools (technical colleges) attended by 63 700 students ("Narodna Mladej" 24 May 1958, "Statistica" No 1/1959).

f) Unified Secondary Polytechnical Schools (Edinna sredna politekhnicheska uchilisht, ESPU)

In 1979, Zhivkov introduced a sweeping educational reform, claiming that Marxist teachings on educating youth were still not being applied completely. Zhivkov therefore created Unified Secondary Polytechnical Schools (*Edinna sredna politekhnicheska uchilishta*, ESPU), in which all students would receive the same general education. The system united previously separate specialized middle schools in a single, twelve-grade programme heavily emphasizing technical subjects. In 1981, a national programme introduced computers to most of the ESPUs. The change produced a chaotic situation in which teaching plans and programmes had to be completely overhauled and new textbooks issued to reflect the new educational emphasis. This project proved unworkable, and by 1985, new specialized schools again were being established.

g) Higher Educational Institutes (Universities etc).

The higher educational institutes, as laid down in the law on higher education, were training highly qualified specialists, educated in Communist spirit for the national economy, state and social offices develop science and culture on the basis of the Marx-Lenin teaching (MES, 1958a).

Under the new Law on University Education adopted by the Bulgarian National Assembly on 6 February 1958 (MES, 1958a) persons who had completed their medium education in pedagogical institutes or medium professional-technical schools and had completed their military service could become candidates in the competition for entering the higher education institutes, like the universities. The candidates should be 35 and/or under while for correspondence courses the maximum age was 40⁵³.

⁵³ The regulation for admission of students to higher educational institutes was published in "Izvestia" No 26/1958.

The length of university education was from four to six years depending on the course taken. If students had taken a correspondence course, they should spend an additional year of studies in the given subject.

A ministerial decree of 22 July 1958 prescribed one year of practical work in production and a special state license examination for the graduates of the different technical and rural high educational institutes. The decree was applied for all graduates of these institutes at home and abroad after 1 January 1959 (Ibid No 63/1958). The students were given monthly wage of 600 leva during the period of their practical work in production.

The following higher educational institutes existed as of 1959 in Bulgaria:

- State University in Sofia;
- The "Georgi Dimitrov" Higher Institute of Rural Economy in Sofia;
- The "Vassil Kolarov" Higher Institute of Rural in Plovdiv;
- Higher Institute of Veterinary Medicine in Sofia;
- Higher Institute of Medicine in Sofia;
- Higher Institute of Medicine in Plovdiv;
- Higher Institute of Forestry;
- The "Karl Marx" Higher Institute of Economics in Sofia;
- Higher Institute of National Economy in Varna;
- Higher Institute of Finance in Svishtov;
- Higher Institute of the Food Industry in Plovdiv;
- Higher Institute of Machine-Electro-Technics in Sofia;
- Higher Institute of Chemical Technology in Sofia;
- Higher Institute of Mining and Geology in Sofia;
- Higher Institute of Building Engineering in Sofia;
- Higher Institute of Mechanization of the Rural Economy in Russe;
- Higher Institute of Fine Arts in Sofia;
- Higher Institute of Theatrical Art in Sofia;
- Higher Institute of Physical Culture in Sofia;
- State Conservatory in Sofia.

To the above institutes should be also added: the Superior School for Clergy (Visha Duchovno Uchilishte), military academies, higher Party school, etc⁵⁴.

This shows the increasingly importance they commenced to give on the higher education and teachers' specialization and training. This is also evident from the high participation rates: during the school year 1956/57 for example, there were 20 Higher Educational Institutes (universities, etc.) with about 41 000 students ("Statistica" No 1/1959), including 8 177 students taking correspondence courses.

7.3 SECONDARY EDUCATION CURRICULUM UNTIL 1989

Throughout the whole existence of the modern Bulgarian State (19th-20th century), the educational content for general education in Bulgaria has been designed to reflect the traditional concept that students should acquire "universal knowledge". Other European education systems, as the German and the Russian, were also structured around the same principle.

In practical terms, this means that a large number of subjects, which were considered fundamental for modern science, were studied virtually throughout the whole education cycle from 1st to 12th grade; while certain components especially in subjects with strong socializing effect (such as *Bulgarian language, Literature and History*), were repeated and built upon in each of the three levels in general education: primary, basic and secondary. For instance, *modern Bulgarian History* (Revival and Modern Times) and *contemporary Bulgarian literature* (19th-20th century) was studied in 4th, 7th and 11th grades.

This tendency was not so common in the "non-ideological" subjects and in exact sciences, where the content was organized to build upon already acquired knowledge. For instance, facts on main climatic processes were first introduced in 3rd and 4th grades, then there were

⁵⁴ The compilation of this list was made from "Izvestia" Nos 39/1955 and 26/1958.

further enriched with examples from the continental Geography in 7th grade and finally with a review of possible impact on economic development in 10th grade.

Following this approach, the focus of the curriculum content was placed on the most essential and different achievements of each specific science. Teaching methods were given far less importance and there was no real attempt to establish interdisciplinary links across the curriculum. The curriculum was in fact a compendium of study programs for each subject put together rather mechanically, along with their respective class hours. The term “curriculum” was used to denote only the number and distribution of class hours, while the content was described in the so-called “study programs”. In this sense, the curriculum was perceived by the teachers as a sort of a roster, rather than as a strategy for development and a framework of the overall teaching and learning process (see Annexes 1, 4 and 6: old study programs of *Bulgarian language and literature*, *Geography* and *French language* for 9th grade, as well as chapters 7.3.1 and 7.3.2).

Communist rule in Bulgaria brought forth a new approach to education as a means of teaching Marxist theory and communist values. Literacy was promoted so that the communist-controlled press could be disseminated throughout society. New classes for both adults and children aimed at providing as many as possible with a high-school education and abolishing illiteracy. Schools switched their focus from liberal arts to technical training and introduced a curriculum modeled on that of the Soviet Union. Copies of Pravda, the primary newspaper of the Communist Party of the Soviet Union, were distributed even in isolated villages.

Generally, education, based on the idea that students should acquire universal knowledge, is characterized by rather small specialization, which is done in higher levels of education. Thus, profile-oriented schools did exist, but they were only a few specializing in foreign language teaching, vocational schools, and schools of arts. Except for a few schools of arts, these used to offer only upper-secondary education, i.e. students entered these schools after completing compulsory education. Regardless of their profile, throughout the whole education cycle, these schools offered the full range of subjects, both in pure and exact

sciences as well as in Humanities, with a relatively small difference in the class hour allocation⁵⁵.

The presumption was that “students should have the opportunity to choose the path of their professional and social fulfillment only after they become full-fledged citizens⁵⁶: when they reach the lawful age, which coincided with the end of secondary education. Early specialization would only limit their choices. Therefore, the ultimate goal of the Bulgarian education was to produce “*harmoniously developed individuals*”⁵⁷ of the kind the citizens of the “*developed socialist society*”⁵⁸ were expected to be.

Throughout the 1980s, there were several attempts to combine general education with practical knowledge and skills. The official justification for these measures was that “young people cannot achieve good professional fulfillment upon completing secondary education because the knowledge they have acquired is not coupled with practical skills”⁵⁹. Since employment in this period was almost compulsory and according to official national data, unemployment did not exist in Bulgaria, it is very difficult to judge what reasons really justified these measures.

In the beginning of the 1980s, under the pretense that “*the developed socialist society is entering into a new phase*”⁶⁰, large-scale measures were introduced to revise the educational content in order to promote practical skills necessary for effective professional fulfillment of secondary education graduates.

To this end, lower-secondary school programs in strictly practice-oriented vocational subjects (such as “Manufacturing and machines”⁶¹) were revised and class hours were

⁵⁵ The most significant difference was in fact in art schools, where the content in pure and exact sciences was reduced by 25-30%, but only in upper-secondary education.

⁵⁶ Stated in National Education Act and Higher Education Act, adopted in 1971.

⁵⁷ This phrase is repeated in the preambles of all national legislative Acts on education adopted between 1971 and 1989.

⁵⁸ In 1971, the Government of then communist Bulgaria took a course towards building what was called a “developed socialist society”. A new Constitution and many new laws were adopted based on this.

⁵⁹ This phrase exists in the preambles of all National legislative acts on education adopted between 1971 and 1989.

⁶⁰ This is again a concept within the “developed socialist society” explained above.

⁶¹ Those still exists in the current curriculum.

allocated for vocational training in upper-secondary education even for the non-vocational schools (with subjects such as “*Structure and Operation of Motor Vehicles*”, “*Production Technologies*”, “*Production Practices*”, etc.).

For five years, a vocational training model was experimented, under which, the content of general education subjects was squeezed into fewer school years⁶². In this way, in the last year of secondary education, students could work as interns in actual production facilities and study in the same time in an intensive program the theory of the professions they practice.

The large-scale experiment was discontinued in 1989 and no analysis of its impact was ever published. In effect, some experts believe that this experiment resembles the recently stated intentions of some political circles to establish a closer link between secondary education and the labor market. However, back in the 1980s, this was conducted in the conditions of full employment and unlimited resources (both political and financial) available for experimenting.

During the Communist period, the study of Russian over a period of 8 years (4th–10th grade) was compulsory at that time for all. After the overthrow of Zhivkov, however, English became the most studied foreign language in Bulgaria, and the study of Russian declined dramatically. The demand for English language was indeed greater than other western languages: at the end of the ten-year period (1980-1990) the number of students who were studying English was increased 4 times, while for German and French the increase was 1.6 and 1.4 times, respectively.

⁶² At that time the workload of students in upper-secondary education (9th –11th grade) reached 38 class hours per week.

**TABLE 7.1 NUMBER OF STUDENTS STUDYING A WESTERN EUROPEAN LANGUAGE IN
GENERAL EDUCATION SCHOOLS, 1980-1990**

<i>School year</i>	<i>English language</i>	<i>German language</i>	<i>French language</i>	<i>Other languages</i>
1980/81	51,230	83,300	172,911	350
1981/82	58,115	90,842	179,804	764
1982/83	66,308	99,844	192,026	552
1983/84	67,941	95,995	183,856	1,028
1984/85	75,276	96,407	178,963	1,241
1985/86	117,862	130,294	249,356	1,241
1986/87	165,122	160,165	303,195	
1987/88	183,178	159,910	296,925	1,077
1988/89	198,856	150,875	278,350	1,295
1989/90	207,671	135,762	239,373	1,362

Source: Statistical Yearbook (1980–1990), National Institute of Statistics

Given that our study focuses on the curriculum changes implemented in the curriculum areas of social studies and humanities, in the following sections, we present examples of the curricula of *Geography*, *Bulgarian language and literature* and *French language and literature*, studied in the 9th grade of upper secondary education before the new curriculum framework was implemented in Bulgaria.

7.3.1 Social Studies

Within the curriculum area of social studies, we have chosen to present the curriculum of *Geography* for the 9th grade (see annex 4). We have chosen the 9th grade for its significance in the structure of the Bulgarian education system. The 9th grade is the transitional grade from the lower secondary education to the upper secondary education, which also coexists with a transitional age for the pupils. Students attended the 9th grade are 15 years old, an age which marks the transition from childhood to youth life. This is the beginning of the stage determining the degree to which young people will become active and productive citizens of their communities. It is the time when the character of young people is being formed and important values such as democracy, social inclusion, tolerance and ethics become or not, consolidated principles in students' minds. All these are determinant for the future social development of each nation.

Geography, under the old study plan, adopted with Order No RD 09-395 of the Minister for Education and Science issued on April 16, 1993⁶³, was being studied for five years from the 6th to the 10th grade of secondary education for 2 weeks out of the 34 for the first three grades (grades 6th to 8th in lower secondary education) and for 2 weeks out of the 36 in grades 9 and 10 of upper secondary education. In primary education, basic information on geography was being studied through the subject of *Introduction to Geography and History of Bulgaria* studied for 1/2weeks out of the 31 in the 1st grade and for 2 weeks out of the 32 in grades 2 to 4 (for the complete study plan see Annex 8).

The main goal of this subject in the 9th grade was to build upon already studied content by providing student with knowledge and skills on natural resources, the political, social and economic organization of the Bulgarian society, the population and settlements, the national economy, and the main geographic regions of the world.

⁶³ This was amended and supplemented by the Order No RD 09-352 of May 23, 1995, Order No RD 09-317 of March 27, 1996, Order RD 09-37 of January 31, 1997 and Order No RD 09-390 of June 8, 1998.

The curriculum included both the learning content and the time allocated to it (see annex 4).

It was structured into six sessions:

- the main objectives;
- the structure and content of the course and the specific time allocated to each topic;
- the key requirements for selecting and structuring the content;
- the exit level knowledge and skills;
- the topics for compulsory elective classes and their time allocation;
- the main concepts: a list of key concepts, which students should be introduced to throughout the course.

The old curriculum also referred to the interdisciplinary links that should be established with the content of other curriculum subjects such as *History, Bulgarian language, Foreign languages, Chemistry, Biology, etc.*

7.3.2 Humanities

We have chosen to analyze the curricula studied in the 9th grade for:

- a) Bulgarian language and literature, and
- b) French language and literature

This choice is granted in two main reasons: they can allow us to see the evolution of their content and the possible discharge of ideological ideas, as well as the degree of innovation in the didactic approaches used (see chapter 4.1).

The subject on *Bulgarian language and literature* being compulsory throughout the general education, from the 1st to the 12th grade, is highly significant for the education of the Bulgarian youth. It is also a subject that can allow us to examine the shift in the purpose of educating the youth under the communist regime and upon the democratization of the Bulgarian society.

The examination of the curriculum of a *Foreign language* is also significant, not so much from the point of view of the content but from the point of view of innovative didactic that may be applied. In many educational systems foreign languages as school subjects are pioneers in applying new didactic methods. For the case of Bulgaria, where great emphasis is being given in language profile schools, this becomes even more important.

Our decision to analyze the curriculum of *French language and literature* was not symptomatic. Bulgaria has been a full-fledged member of the “*Organisation Internationale de la Francophonie*” (OIF) since the Mauritius Summit in 1993.

While French is not the most widespread language in Bulgaria, as there is a great deal of interest in Russian and English, the position of French can nevertheless count on quality language teaching and numerous cooperation tools, which play a role in creating an original francophone landscape in southeastern Europe. Accordingly, Bulgaria is the second-leading country of Central and Eastern Europe teaching French, with 10% of secondary school enrolment. In addition, nearly 10 000 students attend 41 bilingual secondary schools and there are six French-language university courses of study.

Bulgaria maintains good cultural scientific and technical cooperation with France. France's cultural presence in Bulgaria benefits from a long-standing tradition that dates back to the Middle Ages and that became widespread under the Ottoman Empire. The cultural cooperation between France and Bulgaria is based on the Cultural Centre in Sofia and the network of eight "*Alliances Françaises*" located in the provinces (Blagoevgrad, Bourgas, Kazanlak, Plevna, Plovdiv, Stara-Zagora, Varna and Véliko-Tarnovo). Sofia is also home to a Francophone Institute for Administration and Management (IFAG) as well as a francophone regional centre for educational engineering. It is also interesting, that two representative intellectuals of humanities in France are Bulgarian immigrants: Julia Kristeva⁶⁴ (Юлия Кръстева) and Tzvedan Todorov⁶⁵ (Цветан Тодоров).

The two countries have long lasted productive political and economic relations. Traditionally, France has enjoyed a great deal of sympathy by the Bulgarians, reinforced by its support of Bulgaria's dual candidacy for European Union and NATO membership. France is now ranked among Bulgaria's six leading trading partners (Ministry of Foreigners and European Affairs, 2006⁶⁶).

⁶⁴ Julia Kristeva is a Bulgarian-French philosopher, literary critic, psychoanalyst, feminist, and, most recently, novelist, who has lived in France since the mid-1960s.

⁶⁵ Tzvedan Todorov is a Franco-Bulgarian philosopher. He has lived in France since 1963 writing books and essays about literary theory, thought history and culture theory.

a) *Bulgarian language and literature*

Bulgarian language and literature under the old study plan was being studied for 8 weeks in primary school (grades 1-4), for 5 weeks in lower secondary school (grades 5-8), for 3 weeks in the grades 9-11 of the upper secondary school and for two weeks in grades 12-13. It is the subject that more hours were being allocated in primary and lower secondary school in comparison to the other subjects, while it is the second subject with more teaching hours in upper secondary education (grades 9-13) after *Mathematics* and *Foreign languages* (see Annex 8: Study plan general education 1997/98⁶⁷).

The content of *Bulgarian language and literature* in the 9th grade was comprising the study of three main topics: Bulgarian language and Western European literature (including European Renaissance and Classicism), Bulgarian language and Russian classical literature, and Bulgarian Renaissance literature, including new Bulgarian poetry and the advent of new Bulgarian theater and drama (for the complete curriculum see Annex 1).

The curriculum was presented in two columns (see table 7.2): the left column presented the compulsory content for all schools to be covered during the 3 class hours per week within the 36 school weeks of the academic year; while the right column presented the indicative content for elective classes in profile oriented schools to be covered within 1 class hour per week out of the 36 school weeks of the academic year. For both cases, the curriculum was indicating the specific authors and literature works that should be studied. The topics to be studied in elective and profile-oriented classes were chosen by the teacher. In making such choices, teachers could rely on the non-compulsory content included in the textbooks, but were also allowed to use other teaching materials they were seeing fit.

⁶⁶ Last updated on 11/10/06, found in http://www.diplomatie.gouv.fr/en/country_files_156/bulgaria_354/index.html

⁶⁷ Adopted with Order No RD 09-395 of the Minister of Education and Science issued on April 16, 1993, amended and supplemented Order No RD 09-352 of May 23, 1995, Order No RD 09-317 of March 27, 1996, Order RD 09-37 of January 31, 1997 and Order No RD 09-390 of June 8, 1998

TABLE 7.2 EXAMPLE OF THE CURRICULUM FOR BULGARIAN LANGUAGE AND LITERATURE FOR 9TH GRADE (1997)

Compulsory content	Indicative content for elective classes or classes in profile-oriented schools
36 school weeks, 3 class hours per week	36 school weeks, 1 class hour per week
Bulgarian Language and Western European Literature	
Styles in written Bulgarian language. Scientific and academic writing. Genres.	Genres: bibliographical description, annotation, comment, criticism
European Renaissance Renaissance Literature Cervantes Don Quixote	Petrarch Canzoniere Boccaccio Decameron Dante Alighieri Inferno
Text. Elements of a text. Communication and texts. (revision of already studied content with new additions and extensions) Logical unity of texts Linguistic unity in a text. Scientific writing. Literary texts Literary and academic writing	Communication. Speech etiquette.
Shakespeare Hamlet Written assignment on “Hamlet” Discussion on the genre and composition consistency in a text (based on the students’ written assignments)	Shakespeare Sonnets, Macbeth, Midsummer night’s Dream, Romeo and Julliet (one of the above, as chosen by the teacher)
Classicism in literature Moliere, Tartuffe or Corneille, Cid (as chosen by the teacher)	Works by the following authors, as chosen by the teacher: Denis Diderot, Johann Goethe, Victor Hugo, Heirich Heine, P. B. Shelley, George Byron, Honore de Balzac, Guy de Maupassant, Charles Dickens

Source: Translation of official curriculum, MES, 1997b

The learning content was focusing on the great works of each period and geographical zone. From the Western European literature, there were studied “Don Quixote” of Cervantes, “Hamlet” of Shakespeare, and “Tartuffe” of Moliere as well as works as chosen by the teacher (in the elective classes) of Denis Diderot, Johann Goethe, Victor Hugo, Heirich Heine, P. B. Shelley, George Byron, Honore de Balzac, Guy de Maupassant and Charles Dickens. From the Russian Classical Literature, the “Eugene Onegin” of Pushkin, the Dead Souls of Gogol, a novelette as chosen by the teacher of Dostoevski, and the short stories of Chekov were included in the statutory learning content. From the Bulgarian Renaissance, there were foreseen literature, public activity and political journalism of Luben Karavelov, Petko Slaveykov and Hristo Botev.

One can observe that the authors proposed for the study of *Bulgarian language and literature* in the 9th grade under the period of communism were all ideologically marked with a strong social orientation. For instance, Diderot -a prominent figure in the Enlightenment- and Balzac -generally regarded as a founding father of realism in European Literature- were the representatives of the capitalistic society; while Maupassant and Dickens were major representatives of Naturalism. Naturalism, a movement that seeks to replicate a believable every day reality, is opposed to such movements as Romanticism or Surrealism, in which subjects may receive highly symbolic, idealistic, or even supernatural treatment. Naturalistic writers, influenced by the evolution theory of Charles Darwin, believed that one's heredity and social environment decide one's character. Whereas realism seeks only to describe subjects as they really are, naturalism also attempts to determine "scientifically" the underlying forces (i.e. the environment or heredity) influencing these subjects' actions. Naturalistic works exposed the dark harshness of life, including poverty, racism, prejudice, disease, prostitution, filth, etc. They were often very pessimistic and frequently criticized for being too blunt.

Therefore, in the content of this curriculum subject, great emphasis was being given on the social problematic. Literature movements such as Symbolism (for example, Baudelaire and its work "Correspondence") where everything is being represented in symbols and the social problematic is not in the focus were not included in the learning content. In addition, great representatives of the contemporaneous, actual thinking in the era of Renaissance such as Michele Montaigne, were not mentioned.

As far as regards the study of the *Bulgarian language*, which was being studied together with the *literature*, the old curriculum was focusing only on the stylistic aspect of the language and its different functionalities. It was suggesting the learning of different styles of writing, such as the scientific, literary and academic writing. The old curriculum was also guiding the teacher to teach the use of language for writing different documents, such as official, administrative and business texts, professional CV, letters of recommendation, letters of authorization, declarations and minutes.

The old curriculum included very brief guidelines in the form of bullet points for the oral and written examination of the pupils. For the 9th grade, the examination consisted in literary and academic writing, analysis of a given literary text and comments, and discussion of a general cultural, social, or ethical issue.

Finally, the curriculum was concluding with the indication of the knowledge that pupils should acquire at the course of this grade on this specific subject. The curriculum was only limited in denominating the concepts which students should be able to understand; concepts such as Renaissance, Classicism, Romanticism, Character in a literary work, Novel, novelette, elegy, pamphlet, Drama, Comedy, etc.

b) French language and literature

The old curriculum for *French language and literature*, used in secondary education in Bulgaria until the new curriculum framework was introduced in 1999, was based on the four skills traditionally included in the methodological approach for teaching foreign languages. In particular, it was designed according to the descriptive instrument called “threshold level” developed from around the mid-1970s and onwards, by the Council of Europe's experts. These specialists worked out an operational model for abilities, which specific groups of learners (tourists, businesspersons, migrants, etc.) require for using a language for independent communication in a country in which this language is the everyday medium for communication. By identifying these groups' language needs, they were able to pinpoint the knowledge and know-how required for attaining this communication “threshold”.

The first specification of this “threshold level” was formulated for the English language (Council of the European Union, 1975), quickly followed by French (Council of the European Union, 1976). These two instruments have been used de facto as models for the same type of reference instruments that were produced subsequently for other languages, but they were adapted to suit the peculiar features of each language. These threshold levels have also gradually changed, and they still play a major role in language teaching, often serving as the basis for new national teaching programmes. They help make the textbooks

more motivating and facilitate development of more realistic and transparent evaluation systems.

The old curriculum for *French language and literature* studied in the 9th grade was organized in specific goals to be achieved and concrete contents to be studied. The goals were divided in specific objectives for developing each of the four main skills: reading, listening, speaking and writing (see Annex 6 for the complete curriculum of the 9th grade).

As far as concerns reading skills, the students were expected to read and understand in some detail authentic texts, which they have not studied before. Texts could contain some unfamiliar words or phrases, the meaning of which could be grasped based on the context or the analogy with “international” words, as well as based on a root or a word-forming pattern that is familiar to the students.

Regarding listening comprehension, students were expected to understand the general meaning and some important details of spoken statements when communicating with French language speakers, talking on the phone, listening to the radio, watching TV or listening tapes.

For speaking skills, students at the end of the academic year were expected to make their own oral statements independently, as well as to carry on a conversation when communicating with French language speakers or talking on the phone.

Finally, for skills related to writing, students were expected to produce written text on everyday issues, presenting facts and events and using the appropriate style for the chosen communicative situation.

The learning contents to be covered were indicated by concrete list of topics, texts and spheres, roles and places of communication. A topic for instance could be “moving to a new house or neighborhood, making new friends and acquaintances”; then, different texts were proposed to be taught for covering this topic in order to develop the four skills mentioned above, defined within different contexts where students were asked to perform different roles depending on the communicative situation and the place of communication.

CHAPTER 8. SECONDARY EDUCATION IN BULGARIA DURING THE TRANSITION TO DEMOCRACY: 1989-2007

In 1989, Bulgaria initiated a process of deep political and socio-economic reforms, which gave rise to public expectations of rapid improvements in individual liberties and living conditions. The need for reforming secondary education began as early as democratization was established, however, the essential reforms haven't been implemented until 2001/02. These reforms, on one hand, were designed to assure the adaptability of the education system to new challenges of a market economy and democratic society, and on the other hand, were generated in order to establish a suitable system of schooling compatible with European standards and capable to provide a valuable system of knowledge and skills.

Among the democratic changes brought about in the educational system after 1989, the adoption of a new Education Act (1991) which is still in force in the educational system, should be mentioned. Under this Act, democratic principles for the functioning and administration of schools have been introduced and serious attempts have been made to harmonize Bulgarian school legislation with the standards of the European countries. In the following sections, we will examine these developments and we will present the functions of the key actors involved in the administration of the educational system in detail. This will allow us to better understand the points of views of the actors involved in the curriculum reform, presented and discussed later in chapters 11 and 12, based on the role they play in the education sector.

8.1 INSTITUTIONAL AND LEGAL FRAMEWORK DURING THE TRANSITION TO DEMOCRACY

The general administration of the education system currently is carried out by the Council of Ministers. The management bodies of the public education system are the Ministry of Education and Science, the Regional Education Inspectorates and the heads of kindergartens, schools and servicing units. The management of education is carried out at three levels: national, regional and school level.

8.1.1 Administration at National level

At national level, the Ministry of Education and Science carries out the management of education, which is a body of the Council of Ministers responsible for the development and implementation of the state policy in the educational system.

The Ministry of Education and Science participates in the formulation of the state policy by working out (Eurydice, 2003d):

- national strategies, priorities and programs for development of the public education system;
- the state educational requirements for the public education system;
- programs for qualification of the staff within the public education system; and
- programs for international cooperation in the field of education.

The Ministry of Education and Science carries out the state educational policy by:

- providing conditions for functioning and development of the public education system;
- coordinating the relationship between the institutions in the public education system, the government institutions, the non-governmental organizations and the social partners;
- exercising control over the activities of the Regional Education Inspectorates, kindergartens, schools and servicing units.

The Minister for Education and Science is a central one-man body of the executive, who manages and represents the Ministry. The Minister manages, coordinates and controls the implementation of the state policy and the European integration in the field of education and science. A specialized administration of the Ministry of Education and Science assists the Minister in exercising his/her powers.

The Ministry of Education and Science is also responsible for the financing of the education. Educational financing in Bulgaria is carried out in the following way: each year, the Ministry of Education and Science specifies the annual cost per pupil in compliance with the state educational requirements, differentiated by educational level and type of school, and according to the conditions in the respective settlement, after its coordination with the Ministry of Finance.

After the funds are specified by approval of the national budget adopted by the National Assembly and the municipal budgets, the Ministry of Education allocates budget funds for capital investments, subsidies for scientific research in the field of preschool and secondary education and for the training of teachers and heads. The Ministry of Education and Science and the Ministry of Finance approve the standards and provide the regulators and other economic conditions for the efficient operation of schools. Funding for maintenance and pay comes under a separate heading in the budgets of the municipalities and the Ministry of Education and Science. Funds are allocated to the schools and serve as basis for each school to draw up its own budget.

Apart from the national budget, schools may raise funds themselves for maintenance and development of their facilities and equipment from the municipal budgets and from sources provided for in other laws and acts of the Council of Ministers, from additional activities, donations or earmarked contributions made by natural and legal persons.

Funds from additional activities may be raised by leasing school and sports facilities, machines and equipment, agricultural lands and the respective rent for them, by training and manufacturing activities, by providing teaching and other services duly specified by an ordinance of the Minister for Education and Science. The above funds may be spent only by the school and servicing unit that has raised them.

Professions and specialties, types of schools and servicing units, where education is fully funded by the national budget, are specified in a list approved by the Council of Ministers.

Construction, maintenance, repairs, reconstruction and modernization of the facilities of schools are carried out mainly by using funds from the budgets of the municipalities and partly from organizations for the needs of which schoolchildren are trained.

The budget funds for secondary education are provided by the budget of the Ministry of Education and Science and other Ministries and government departments, as well as by the budgets of the municipalities, which allocate those funds to kindergartens, schools and servicing units on the basis of the average level of budget funds spent, which was reached in the preceding year, and increased by the respective inflation rate (see tables 8.1 and 8.2). Such a mechanism of budget funding is applied irrespective of the fact that it is stipulated in the Public Education Act (PEA) that the amount of funds needed for secondary education is to be specified on the basis of differentiated annual standard rates for pay per child or pupil in all types and levels of kindergartens, schools and servicing units.

As a result of the democratic and socioeconomic changes brought about in Bulgaria, the Ministry of Education and Science has been forced to experiment and implement in a large number of municipalities a new mechanism for administration and funding of schools called "delegated budgets". "Delegated budgets" are planned to be introduced into all schools by 2009 (World Bank, 2007a). The main objective of the system of delegated budgets is to create and develop decentralized financial management of secondary education, to endorse the financial independence of schools, and to achieve transparency with respect to allocation of funds. The funds under the delegated budgets are raised mainly from two sources: the national budget and loans from the World Bank. Schools will be entitled to act independently in the sphere of finances and to receive the allocated funds according to a specific formula for each school. The school acquires the right to keep the additional revenues accumulated and to use them, at its own discretion, for development of its facilities. Another novelty is that, within the same financial year, funds from one budget line may be carried over to another budget line following an approval by the funding body.

TABLE 8.1 EXPENSES FOR EDUCATION AND SCIENCE IN THE CONSOLIDATED NATIONAL BUDGET (CNB)

	2000			2001		
	<i>In BGN</i>	<i>% of CNB</i>	<i>In US dollars</i>	<i>In BGN</i>	<i>% of CNB</i>	<i>In US dollars</i>
Education and research expenses and books for libraries	18 169 800	0.2	8 570 660	19 318 000	0.2	8 861 468
Science	113 795 200	1.0	53 676 981	97 617 300	0.8	44 778 578

Source: NSI, 2002

TABLE 8.2 AMOUNT OF GDP AND EDUCATION COSTS BY YEARS (IN '000 LEVA)

Year	source	GDP	education costs	% of GDP
1990		45 390		
1991		135 711		
1992	Report	200 832	12 177.90	6.06
1993	Report	298 934	17 150.10	5.74
1994	Report	525 552	25 050.40	4.77
1995	Report	880 322	35 537.20	4.03
1996	Report	1 761 172	55 553.30	3.15
1997	Report	17 432 554	684 441.00	3.90
1998	Report	22 421 142	865 589.90	3.86
1999	Report	22 776 000	988 735.50	4.34
2000	Report	22 454 000	1 129 876.00	4.44
2001	National budget Act	28 461 000	1 090 056.00	3.83
2002	Forecast/plan	30 783 000	1 271 300.00	4.13

Source: NSI, 2002

Under the Higher Education Act, higher education in the Republic of Bulgaria is run by the National Assembly, the Council of Ministers, the Ministry of Education and Science and the National Evaluation and Accreditation Agency (NEAA). The National Assembly opens, transforms and closes higher schools. It adopts the National Budget Act, which determinates the budget allocation for each state higher school.

The Council of Ministers approves the national policy in the field of higher education and the uniform state requirements towards the content of the main documents, issued by higher schools. It represents the interests of the Bulgarian higher education and science before other state and international organizations and signs international contracts and agreements.

The Council of Ministers is the body, opening, transforming and closing faculties, institutes, departments and colleges of state higher schools based on a request by the respective higher school and/or on proposal by the Minister for Education and Science. On proposal by the Ministry of Education and Science, the Council of Ministers approves a classifier of the areas of higher education, the vocational training areas, uniform state requirements for acquiring higher education by educational and qualification degrees and uniform state requirements for the regulated professions by majors. Every year, the Council approves the number of students admitted to higher schools, given that in state higher schools, their number varies for the separate professional areas and educational and qualification degrees. It also approves the total number of students admitted to private higher schools and doctoral candidates to higher schools.

The Council of Ministers sets the education fees for state higher schools and approves the terms and procedure for granting fellowships for studies in state higher schools, for using boarding houses and other social and utility benefits by students, doctoral candidates and post-graduate students in all higher schools.

Along with this, the Council of Ministers approves state requirements for recognizing university education acquired in foreign higher schools.

The Ministry of Education and Science is the main body exercising supervision over the higher schools and implementing the national policy in the field of higher education. Actually, the Council of Ministers exercises most of its law-stipulated powers following proposals received from the Ministry of Education and Science.

8.1.2. Administration at Regional level

Management of education at the regional level is carried out by the Regional Education Inspectorates. These are territorial administrations, subordinate to the Minister for Education and Science, responsible for implementing the state educational policy on the territory of the respective districts. In the scope of their management responsibilities is the overall activity of all types and levels of schools, kindergartens and servicing units. In concrete, they are responsible to:

- provide conditions for functioning and development of kindergartens, schools and servicing units on the territory of the respective district;
- coordinate the relationship between the institutions within the public education system, the regional government institutions, the non-governmental organizations and the regional structures of the social partners;
- control the application and fulfillment of the state educational requirements by the state-maintained, municipal and private kindergartens and schools, and by the municipal and the government servicing units with a social purpose, such as homes for education and training of children deprived of parental care, etc.

Nationwide, there are 28 Regional Education Inspectorate with a total staff of 620 people, (Eurydice, 2003d). Each Regional Education Inspectorate is managed and represented by a head, who is a government official and is appointed by competition by the Minister for Education and Science. Inspectorate activities are carried out by public servants and people employed on the grounds of labor relations. Depending on the distribution of activities, the administration of the Regional Inspectorates is both general and specialized and is organized in departments: Administrative-legal, Financial-economic and Information Services.

The specialized administration is organized in the Office of Inspection and Organizational-Methodological Activities, which provides the performance of the main functions and specific activities of the Regional Inspectorate. In particular, it:

- coordinates and inspects the implementation and fulfillment of the state educational requirements at kindergartens, schools and servicing units on the territory of the respective district;

- inspects and analyzes the overall organization of the educational process;
- assists in the development of kindergartens, schools and servicing units;
- coordinates the relationship between the institutions in the public education system, the territorial bodies of the executive and other organizations;
- organizes and participates in the implementation of national programs and projects;
- organizes the drawing up of the state admission plan;
- coordinates and organizes the administration of the state matriculation examinations;
- prepares proposals for opening, transforming and closing state-maintained kindergarten, state-maintained and municipal schools and servicing units after carrying out an inspection;
- draws replies to applications, complaints, signals and proposals submitted;
- assists in carrying out forms for qualification of teachers, deputy heads and heads of schools;
- guides children with special educational needs and chronic diseases;
- organizes and conducts work meetings with heads, deputy heads and teachers;
- provides organizational and methodological assistance for the activities of heads, deputy heads and teachers;
- draws up programs and strategies for developing and improving the organizational structures on the district territory;
- organizes the carrying out of regional and national out-of-school activities with pupils;
- is responsible for holding competitions for the position of "head" of a state-maintained kindergarten, state-maintained and municipal school and servicing unit.

According to the Constitution in force in the Republic of Bulgaria, autonomous territorial formations are not allowed; therefore, there are no differences in implementing Bulgarian legislation in various regions of the country.

8.1.3. Administration at Local and School levels

Municipalities are territorial administrative bodies that are not included in the management structure of the educational system, but pursuant to the Public Education Act, they are authorized to perform a number of important functions and assume responsibilities for the education in the respective settlement. In particular, they provide and control the:

- compulsory school education of children up to 16 years of age;
- healthcare and safety to kindergartens and schools, to children and pupils, by establishing health offices for non-stationary medical care;
- funding for the maintenance, construction, furnishing and repair of schools, kindergartens and servicing units;
- funding for meeting the state educational requirements for the annual cost of children and pupils in state and municipal kindergartens, schools and servicing units and for the remuneration in the public education system, as well as for providing funding for the syllabus of municipal kindergartens, schools and servicing units;
- appropriate conditions in canteens, boarding houses, recreation and sports facilities and transportation for children, pupils and teachers, as well as free transportation for pupils under 16 years of age, if there is no appropriate school in the settlement;
- grants and special support for schoolchildren.

Mayors exercise control over the spending of the financial resources provided to municipal kindergartens, schools and servicing.

Kindergartens and schools are state-maintained, municipal and private. Servicing units are state-maintained and municipal.

State-maintained are those kindergarten, schools and servicing units, which are of national importance and are funded by the national budget through the Ministry of Education and Science or through other Ministries and government departments. The real estates conceded to them for use are public state property.

Municipal are those kindergarten, schools and servicing units, which are financed by the municipal budgets. The real estates granted for use to them are public municipal property.

Private are those kindergarten, schools and servicing units, which are opened or reorganized at the request of Bulgarian natural or legal persons and are not funded by the state or municipal budget. They are opened or reorganized by an order of the Minister for Education and Science. The real estates in use are private, state or municipal property granted to or owned by them.

State-maintained and municipal schools, kindergarten and servicing units are managed by a head. He/she represents the governing body of the school and is appointed by competition. The head is assisted by a deputy head in organizing and monitoring the educational, administrative and educational-manufacturing activities of the school in accordance with the legislation in force in the public education system and the respective job description.

His/her most important functions are to:

- organize, control and be responsible for the overall school activity;
- meet and implement the state educational requirements;
- provide safe conditions for education, training and work;
- represent the institution before authorities, organizations and persons and to conclude contracts with legal and natural persons in accordance with the school scope of activity and within his/her competence;
- draw up a budget and be responsible for the lawful, expedient and economic disposal of budget funds;
- conclude and abrogate employment contracts with deputy heads, teachers, tutors, employees and workers under the procedures of the Labor Code;
- announce the vacancies at the Employment Offices and the Regional Education Inspectorates within 3 days from the moment they become vacant;
- award and punish pupils, teachers and employees according to the Labor Code, the Public Education Act and the Code for its Implementation;
- organize the admission of children and pupils and their training and education in compliance with the state educational requirements;
- sign and seal the documents for transferring pupils;
- assist the competent authorities in finding out violations;

- control and be responsible for the proper keeping and storing of school documentation;
- provide conditions for health-prevention activities at school;
- draw up staff's job schedule and respective remunerations.

The main specialized body responsible for discussing and settling major teaching issues at schools is the Pedagogical Council. It includes deputy heads, teachers, tutors and other specialists with educational functions. The chairperson of the Pedagogical Council is the head of school and implements its resolutions. In larger schools, various committees for separate school levels are set up by the Council. The Pedagogical Council is called at least bimonthly by the head or extraordinary – at the written request of at least 1/3 of its members and performs the following functions:

- adopts a strategy for the development of the school which is updated each year;
- adopts the Regulations of the school activities;
- adopts the school syllabus;
- selects the forms of education;
- discusses and adopts resolutions on the results of education;
- selects the procedure for admission of pupils to the school in compliance with the legal requirements;
- approves syllabi for individual forms of education;
- makes proposals to the head for awarding and punishing pupils;
- specifies the activities outside the state educational requirements and adopts programs for their implementation;
- adopts resolutions on transferring pupils within the compulsory school age to an independent form of education for health reasons or in case of gifted children;
- considers the results of the activities of the school library and makes recommendations;
- approves uniforms, school symbols and rituals proposed by the school Board of Trustees.

All classes (grades) in Bulgarian schools are managed by class teachers. For primary and tertiary schools, the class teacher is the teacher of the respective grade, while for secondary

schools, the class teacher may be a teacher of any subject teaching in the respective class (Eurydice, 2003d).

Class teachers plan the class activity and the relationship with the parents of the pupils entrusted to their care and the social environment, and are responsible to carry out extracurricular activities: they provide regular attendance of the children at school; they take care of maintaining a favorable psychological climate and appropriate relationships among pupils in class; they assist in solving problems that may occur; they take special care of pupils lagging behind, of pupils with deviant behavior, etc. Class teachers also keep the school documentation related to their class.

As far as regards higher education, from the beginning of the 1990s, the institutions that offer higher education in Bulgaria are independent legal entities that have academic autonomy: academic freedoms and academic self-immunity on the territory of the higher school. They may define their internal organization and manage their resources on their own. Initially, their right to academic autonomy was regulated by the Academic Autonomy Act adopted in 1990 and later, by the Higher Education Act adopted in 1995 (Eurydice, 2003d).

The academic freedom finds expression in the freedom of teaching, the freedom of carrying out scientific research, the freedom of creative events and the freedom of training.

The academic self-management is expressed in the fact that the institution of higher education has the:

- right to elect management bodies with a specific mandate;
- right to regulate its structure and activities in its own regulations in compliance with the Higher Education Act;
- independent choice of the members of the science teaching team, the conditions for acceptance of students and the training forms for students, PhDs and the post – graduate students;
- independent development and execution of the curricula and the science - research projects;

- choice of the specialties to be taught;
- right to announce completions and select lecturers under the conditions and order as per the Academic Degrees and Academic Ranks Act;
- right to establish own funds and independent specifying the order and way of their utilization;
- right of independent contracting with the state and other consumers for training and for improving the qualification of higher education specialists as well as for the execution of science and applied research;
- right to partnership with other higher schools and other organizations;
- right to construct, own or use of material base necessary for the educational and science research activities and the social – life servicing of students and lecturers, PhDs and employees;
- right of organizing international cooperation, contracting and membership in international organizations.

The management bodies of the state institutions of higher education are the General Meeting, the Academic Council and the Rector, having a mandate of four years.

The General Meeting is the supreme management body having the right to approve or amend the Regulation on the Activities of the higher school; to specify the number of the Control Committee members, elect its members, the Chairman and the Deputy Chairman, the Rector; define the number of the Academic Council and its member; discuss and approve the annual report of the Rector on the higher school status.

The Academic Council is the management body for the educational and science policy of the higher school. It consists of 25 to 45 members and includes representatives of the academic staff, education, students, candidate doctors and employees. It is the body that:

- specifies the educational policy of the higher school, approves the mandate program and controls its execution;
- annually approves the report on the results from the higher school activities;
- makes decisions for the establishment, transformation or closing of departments, faculties and servicing units of the higher school;

- specifies the specialties, the forms and the levels on which the training is carried out and makes proposals about the number of the accepted students;
- approves or changes the qualification characteristics and the curricula for training of specialist in the educational degrees or at the colleges of the higher school;
- defines the science policy of the higher school and resolves main organizational issues and issues referring to the science research activities;
- specifies the structural composition of the general meeting and the organization for the choice of its members;
- defines the personnel policy of the higher school, approves the job descriptions of the academic team and approves the regulation for its attestation;
- elects a deputy-rector after the rector's proposal;
- takes decision for going into partnership with higher schools and science organizations;
- annually approves the budget of the higher school and controls its performance;
- awards the honorary title doctor *honoris causa*;
- elects extra professors and extra associate professors;
- approves regulations for certain educational, scientific, creative or scientific – production activities of the higher school;
- approves the system for evaluation and maintenance of the training quality and the academic team within the higher school.

The Rector represents the higher school and is the Chairman of the Academic Council by right. He/she:

- concludes and terminates labor contracts;
- resolves definitely all issues, related to acceptance, striking names off and transferring students, candidate doctors and post-graduate students;
- prepares and proposes to the Academic Council to approve the annual report of the higher school and publish it;
- proposes to the Academic Council the candidatures of lecturers having academic rank for the election of one or more Deputy rectors;

- if necessary, he/she may call the school collective organs for management of the basic units of the higher school;
- performs other functions ensuing from the law and from the decisions of the Academic Council or the General Meeting.

In his/her activities, the Rector might be supported by deputy Rectors, who organize and bear responsibility for the educational, international and scientific activities of the institution of higher education. The work of the Rector might be supported by a Rector Council or by an Extended Rector Council in some institutions.

The internal control of activities is being carried out by the Control Council. This checks whether the management bodies of the institution and its main units were elected in conformity with the law within one month and reports to the Academic Council about the findings. It prepares a statement on the draft budget of the institution and its use, and reports to the Academic Council and the General Meeting at least once a year.

The common interests of the trainees are being protected by the Student Council. This consists in the representatives of students and candidate doctors in the General Assembly of the institution. The Students' Council adopts rules for its organization and activities and submits it to the Academic Council of the institution. The activities of the Student Council are financed by the institution to the amount of 1% of the education cost. The funds are used for protection of the social interests of the students, such as for carrying out cultural, sports, scientific, creative and international activities. The Student Council has the right to:

- organize the election of its representatives in the management bodies of the institution;
- to propose introduction of subjects to be studied;
- to propose the invitation of external lecturers;
- to organize the establishment of specialized scientific students communities and the publication of their works;
- to set up and manage its own organizational units, if needed;
- to establish domestic and international educational, cultural and post-graduate contacts between the students;

- to express opinion and make proposals for the development of sports activity in the high school;
- to participate in the management of students' hostels;
- to participate in the organization of the training process, the distribution of stipends and aids to students.

The national body, which expresses the common interests of the students and candidate doctors, is the Representation of the Student Councils. The Representation of the Student Councils comprises the chairmen or delegated representatives of the Student Councils of the institution. Its activity is funded from deductions from the budgets of the Student Councils. The Representation of the Student Councils works out statements and proposals on the issues of higher education and science in the institution in question and gives opinion on the state budget for education and culture.

The management of the basic structural levels – faculties, departments, institutes, branches and colleges is similar to the management at institutional level. The different units have a different level of independence, including financial one. Their choice of management bodies might be either independent or included in the powers of the Academic Council or the Rector.

8.1.4 Fundamental principles and basic legislation

The main body of legislation now in force regulating the functioning of the educational system has been enacted since 1990. In 1991, the new Public Education Act (PEA) was passed, which created a new legislative framework for secondary education in Bulgaria. This is of great significance since it recognizes the democratic principles and traditions of the historical development of the educational system, underlying the Constitution of the country as well as the modern trends characteristic of the developed European countries. Among those general principles, a prominent place is taken by the guaranteed right of education and equality of all citizens irrespective of race, nationality, gender, ethnic or

social origin, education and social status. Education is free of charge, compulsory up to 16 years of age.

In 1999, a special law was adopted: the Level of Education, General Education Minimum and Curriculum Act (MES, 1999g). This Act sets the basic educational standards for general education. It specifies the mandatory knowledge and skills, which students are expected to acquire in order to continue to the next level of education and to be competitive in the labor market. The content of each curriculum area included in the general education minimum, contains those fundamental concepts, knowledge and skills, which are considered essential for achieving the goals of education in each level or grade. The general education minimum is compulsory for all students, regardless of the type of school they study in (see chapter 8.3).

Under this law, the MES adopted the Framework Requirements for Developing National Education Standards for the Content of Education (MES, 1999f), which set the criteria and the conditions that the proposed national education standards and the suggested curricula should meet. This document sets the following general requirements for developing national education standards for each the subject:

- language proficiency;
- mathematical proficiency;
- ability to handle information;
- communication skills;
- critical thinking and problem solving;
- learning strategies;
- integrity and interdisciplinary of knowledge and skills.

Current educational legislation in force also includes the following important laws: the Vocational Education and Training Act (MES, 1999c), and the Higher Education Act (MES, 1995a). The Vocational Education and Training Act (PETA) fully regulates the issues concerning the vocational training of pupils in the educational systems: objectives, principles, stages, organization, and management. This law meets, to a great extent, the

European standards and trends (Eurydice, 2003d). The Higher Education Act among others established the autonomy of the higher institutions.

Many of the issues as to functioning and management of the educational system have been regulated by the Code for Implementation of the PEA, which specifies the legal requirements and provides solutions to different educational cases. The structure and organization of the activities of the Regional Education Inspectorates (RIEs) and the Boards of Trustees are also regulated. Ordinances included in the educational byelaws regulate specific activities and issues concerning the educational system: Ordinances for Admission of Pupils to Comprehensive schools and Vocational schools on Completion of Seventh and Eighth Class; Ordinance No. 3/2003 for Assessment in Education; Ordinance No. 4 for Legal Regulations, etc. Other activities are regulated by Decrees of the Council of Ministers, Instructions of the Ministry of Education and Science, Orders of the Minister for Education and Science. The activities teachers are carried out in accordance with their job descriptions duly approved by the Minister for Education and Science.

The majority of these bylaws and minor regulations were meant to address issues on the quantitative indicators of the education system, such as class sizes, number of class hours per teacher, etc. This is because at that time, the education system became increasingly affected by the country's economic and demographic developmental problems: the number of students decreased, the number of dropouts increased, the average standards of living dropped. As a result, teachers had to be downsized, schools in smaller communities had to be closed down, while the social prestige of the teaching profession had diminished dramatically.

BOX 8.1 REGULATORY FRAMEWORK OF EDUCATION

The regulatory framework of education consists of a multitude of laws and bylaws, the most important of which include:

- The Constitution of the Republic of Bulgaria (1991)
- The National Education Act (1991, amended 15 times until 2004) and its Implementing Regulation (1999)
- The Level of Education, General Education Minimum and Curriculum Act (1999, amended 10 times until 2004)
- The Vocational Education and Vocational Training Act (1999)
- The Higher Education Act (1995)
- The Academic Degrees and Titles Act (1975, 2000)
- Regulation No. 5 on Mandatory Teaching Activities and Staff Allocations in the National Education System (2002)
- Regulation No. 7 on the Number of Students and Children in School Classes and Kindergarten Groups (2000, 2003)
- Decision No. 612 on the Division of Activities, Financed by Central Government and Local Government Budgets in Education, Healthcare, Social Services and Culture in 2003, replaced by Decision No 743 from January 1, 2004
- Strategy for the Development of Education in Bulgaria, issued by the Ministry of Education and Science in 2003 and still not coordinated with all stakeholder and relevant institutions.

Source: Author's compilation of data provided in Eurydice, 2003d.

BOX 8.2 NATIONAL EDUCATION STANDARDS FOR THE QUALITY OF EDUCATION

The National Education Standards, which are stipulated in Art. 16 of the National Education Act cover:

1. Preschool education – adopted in 2000
2. Level of education, education minimum and curriculum – adopted in 1999
3. Content of education – adopted in 1999
4. Bulgarian language proficiency – adopted in 1999
5. Assessment system – being developed.
6. Vocational education and vocational training – adopted in 2000
7. Vocational certification – partially developed as standards for approximately 160 professions have been adopted
8. Schooling of children and students with special education needs and/or chronic illness – adopted in 2001
9. Textbooks and teaching materials – adopted in 2000-2001 under two Regulations of the MES
10. School documentation – adopted in 2003 under one Regulation, revised and amended in 2004
11. Extracurricular and out-of-school activities –being developed
12. Teachers' capacity and qualification – adopted in 2003
13. Material and technical resources for education –being developed
14. School healthcare –being developed
15. School safety – adopted in 2002
16. Scientific, information, and library services –being developed
17. Cost of annual tuition for children and students in state-funded and municipal kindergartens and schools – published in September 2004
18. Salaries and compensations within the national education system – adopted in 1999
19. Inspection within the national education system –being developed.

Depending on their status, national education standards are adopted with a decree of the Council of Minister or with Regulations of the Minister for Education and Science.

Source: Author's compilation of data provided in Eurydice, 2003d.

8.2 THE EDUCATION SYSTEM DURING THE TRANSITION TO DEMOCRACY

Under the Constitution of the Republic of Bulgaria (article 53) and the National Education Act (MES, 1991, article 7, paragraph 1), school education in the Republic of Bulgaria begins at the age of seven (or six, if their physical and mental behavior, on judgment of their parents or trustees, allows it) and is compulsory up to the age of sixteen. This implies that by completing this age, students must study in any type of school, either public or private⁶⁸, chosen by them according to their preferences and capacities or by their parents (MES, 1991, article 91, paragraph 1).

Compulsory education is received at full time bases. Other forms of education, such as: evening, part-time, correspondent, individual, independent and distance are chosen under certain conditions and following a decision of the Pedagogical Board (MES, 1991, article 31, sections 1-7). If students carry out their compulsory education at home, they have to pass exams in the respective state or private school, which has given a permit for independent studies.

As we have already seen (see chapter 8.1.3), control over the compulsory school education is exercised by the municipalities. The school Boards of Trustees support the school and the municipal authorities in carrying out the compulsory school education.

Pupils are not allowed to be absent from school without valid reasons. The absence of a pupil has to be verified by a sickness certificate, certificate issued from a sports club he/she is a member of, or a letter of advice written by the parent or the guardian. The absence of a pupil from classes without a valid excuse is an unexcused absence from school. A "transfer to another school till the end of the school year" punishment may be imposed on a pupil if he/she has more than 15 unexcused absences, excluding a pupil in his/her final secondary-school class in both day and evening form of education.

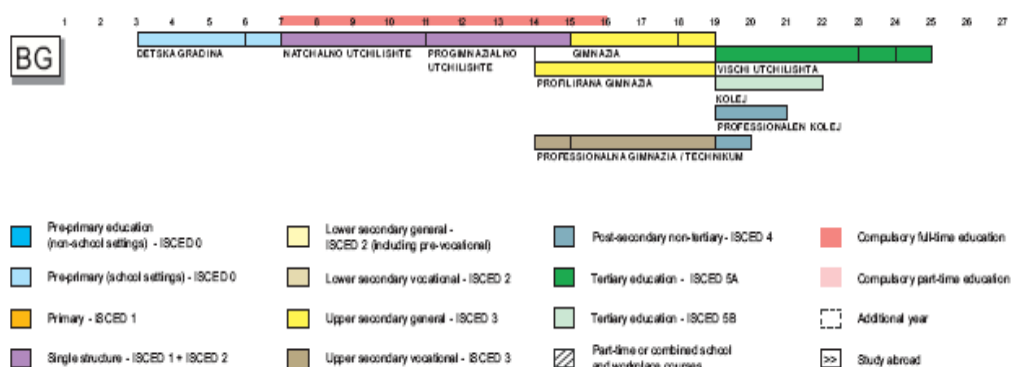
⁶⁸The private school should be established pursuant to the National Education Act and be authorized to issue valid certificates for completed class or acquired professional qualification as well as diplomas for completed secondary education (MES, 1991).

In case of school non-attendance, administrative measures are taken – parents, guardians and trustees not providing school attendance of children for the time they are subject to compulsory education, are fined to the amount of BGN 20 to BGN 100 (approx. € 10 to €51), and if this violation is repeated – from BGN 50 to BGN 250 (approx. € 25 to € 128). Violations committed are verified by certificates drawn up by the respective municipal authorities. Penal orders are issued by the mayor.

With a view to facilitating school attendance of pupils up to the age of 16, coming from settlements where a relevant school is unavailable, either free of charge transportation is provided or boarding-school training in the nearest settlement on the territory of the respective municipality is organized.

The structure of the educational system in the Republic of Bulgaria is composed of the following levels: preschool education, school education (basic and secondary) and higher education (see Figure 8.1).

FIGURE 8.1 ORGANIZATION OF THE EDUCATION SYSTEM IN BULGARIA 2003/04



Source: Eurydice, 2003d.

Preschool education comprises children from 3 to 6/7 years of age. Kindergarten attendance was not compulsory until 2003/04 school year. Since then, children's training in preparatory

groups with kindergartens or preparatory classes to schools has become compulsory as their parents or trustees are exempt from payment of fees.

Basic education (grade 1 through grade 8) includes primary school (1st grade through 4th grade) and lower secondary school (5th grade to 8th grade). This type of education may be obtained in state-maintained, municipal and private schools. Within the framework of the same educational level, additional professional qualifications may also be acquired by vocational and technical programs after finishing grade 6, 7 and 8. On successful completion of grade 4, a “Forth-class Leaving Certificate” is issued and on successful completion of grade 8 – a “Certificate of Completed Basic Education”.

Secondary education may be divided into secondary general (comprehensive or specialized) and vocational.

Secondary general education may be divided into secondary general and secondary specialized education. The former is obtained at comprehensive schools (for 3 or 4 years) and the latter, in specialized profile secondary schools (for 4 or 5 years). Pupils enter the specialized schools on completion of grade 7 or 8 and by taking entrance examinations, which correspond to the profile of the respective school (Bulgarian grammar and literature, mathematics, humanities, etc.).

Vocational secondary education is received at vocational training schools on completion of grade 8 through a 4-year course of study, or on completion of grade 7 through a 5-year course of study. It may also be obtained at vocational technical schools on completion of basic education with a 2- or 3-year educational program. The professional qualification acquired gives the pupil access to the labor market.

As far as regards special education, there is a network of schools - boarding schools, funded entirely by the government - for the handicapped (children with physical and mental deficiencies).

Schools are educational institutions in the public education system, which provide the completion of a grade, acquisition of an educational level and/or professional qualifications.

Various types of school organization function in the Bulgarian educational system, i.e., by educational level, by type of instruction they provide, by type of funding. According to the type of instruction and the educational level, schools are:

- Primary schools, grade 1 through grade 4;
- Lower-secondary schools, grade 5 through grade 8;
- Basic schools, grade 1 through grade 8;
- Secondary, grade 9 through grade 12;
- Specialized secondary schools: pupils enter the school on completion of the 8th year (foreign-language profile schools; natural sciences and/or mathematical profile schools, humanities profile schools, Sports schools; Art schools, etc.). They cover grade 8 or 9 through grade 12.
- Comprehensive schools, grade 1 through grade 12;
- Vocational training schools and/or technical schools, grade 8 or grade 9 through grade 12 or grade 13;
- Vocational training schools, from grade 7 or grade 9 with a three-year training course; from grade 9 with a four-year training course; and professional colleges with a course of study of up to two years;
- Special education schools.

According to the way of funding, schools are state-maintained, municipal or private.

State-maintained schools, which are of national importance and are funded by the national budget, are:

- schools where only pupils with specific educational needs are educated, i.e. children with impaired hearing, vision disorders, mental retardation, speech disturbances, chronic diseases, physical injuries, or children with deviant behavior;
- schools where all profiles or professions studied meet the educational interests and needs of more than one district in Bulgaria;
- Bulgarian schools abroad;
- schools where detainees are educated.

Municipal schools are of local importance and are funded by the municipal budget. Pupils from other municipalities are also entitled to study in such schools.

Private schools are not funded by the state or municipal budget and pupils pay fees for their education.

As of 2002-03, the school network in Bulgaria numbered 3 340 schools. From those the majority (2720) were comprehensive schools, 504 were vocational schools and 134 special education schools (see Tables 8.3-8.7 for the total number of schools by type in 2002-03).

TABLE 8.3 TOTAL NUMBER OF SCHOOLS, 2002-03

Comprehensive	2720
Primary (class 1 through class 4)	321
Basic (class 1 through class 8)	1783
Lower-secondary (class 5 through class 8)	56
Upper-secondary (class 9 through class 13)	161
All grades (class 1 through class 13)	399
Special	134
Recreation	23
For mentally retarded children	75
Reformatory boarding-schools	7
Socio-pedagogical boarding-schools	19
For children with impaired hearing	4
For children with impaired vision	2
For children with speech disturbances (logopedic)	2
Vocational schools	504
Art schools	19
Technical schools and secondary vocational schools	358
Vocational schools with admission on completion of secondary education	18
Secondary vocational-technical schools	105
Secondary vocational-technical schools with admission on completion of grade 6 and 7	3
Vocational-technical schools with admission on completion of grade 8	1
Total:	3340

Source: Eurydice, 2003d

TABLE 8.4 NUMBER OF COMPREHENSIVE SCHOOLS BY PROFILE, 2002-03

Total	2720
Day schools	2706
Non-profiled (non-specialized)	2570
Schools with teaching of foreign languages	73
Sports	16
Schools with teaching of the humanities	14
Schools with teaching of natural sciences and mathematics	33
Evening schools	14
Total of which in villages	1533
Day schools	1533
Non-profiled (non-specialized)	1530
Schools with teaching of foreign languages	2
Part-time schools	1

Source: Eurydice, 2003d

TABLE 8.5 NUMBER OF PRIVATE COMPREHENSIVE SCHOOLS BY PROFILE, 2002-03

Total	59
Day schools	59
Non-profiled (non-specialized)	36
Schools with teaching of foreign languages	20
Schools with teaching of the humanities	2
Schools with teaching of natural sciences and mathematics	1
Part-time schools	-

Source: Eurydice, 2003d

TABLE 8.6 NUMBER OF PRIVATE VOCATIONAL SCHOOLS BY TYPE, 2002-03

Total	39
Art schools	1
Technical schools and secondary vocational schools	24
Vocational schools with admission on completion of secondary education	14

Source: Eurydice, 2003d

Higher education is being provided by universities, academies, institutes and colleges, which may be state-maintained or private.

The university type of higher education provided at the universities and the specialized higher schools: academies and includes the followings stages:

- First stage: a course of study of at least 4 years, receiving a Bachelor's degree upon graduation;
- Second stage: a course of study of at least 5 years, or 1 year following a Bachelor's degree, receiving a Master's degree upon graduation;
- Third stage: a three-year course of study upon obtaining a master's degree that meets the requirements for a Doctor's degree.

Colleges allow the acquisition of non-university (undergraduate) education. Students graduated from college acquire the qualification and educational degree of "Specialist in", which allows them to practice the profession acquired. They may continue their education at an institution of higher learning on the basis of the qualifications acquired at secondary schools.

Non-school establishments are state-maintained or municipal performing various functions under a common objective: to assist in implementing the national educational policy and the educational process by providing conditions for and settling substantive issues as to educational activities. Pursuant to the PEA (Art. 44a), non-school establishments include the various servicing units in the educational system. They are grouped as follows:

- Research-informational: The National Institute of Education, Information Centers, Centers for Educational Services, etc.;
- Non-school pedagogical establishments: hostels, boarding houses, libraries, Centers for Work with Children, United Children's Center, etc.;
- For the management of international programs: Human Resources Development Center, Center for Providing Software Resources on the Financial Management of Secondary Education, etc.;
- For organized recreation and sports: Central Sports schools, camps, qualification and recreation centers;

- Socially oriented: homes for upbringing and educating children deprived of parental care;
- For day-to-day management and provision of financial resources for the public education system.

The total number of non-school institutions related to the educational system in 2002-03 is 332 and are distributed by type as follows (see table 8.7):

TABLE 8.7 NON-SCHOOL INSTITUTIONS RELATED TO THE EDUCATIONAL SYSTEM, 2002-03

Type of Servicing units (Art. 33a, PEA)	Servicing units		
	State	municipal	Total
Research-informational	13	5	18
Non-school pedagogical establishments	18	168	186
For the management of international programs	3	0	3
For organized recreation and sports	2	18	20
Socially oriented	95	10	105
TOTAL	131	201	332

Source: Eurydice, 2003d

8.3 SECONDARY EDUCATION CURRICULUM DURING THE TRANSITION TO DEMOCRACY

Following a radical educational reform initiated gradually as early as 1989, the current principal aims of the Bulgarian education are underlined in the Rules on National Education Act Implementation (MES, 1991) and in the Level of Education, General Education Minimum and Curriculum Act of 1999 (MES, 1999g) (see chapter 8.1.4).

At the level of secondary education, the emphasis is on the encouragement and development of individual interests and abilities, facilitation of the future accomplishment of pupils, formation of specialized knowledge and skills, gaining broader general knowledge and adoption of civil society values. The possibilities for choice within the curriculum in the upper secondary education facilitate the overall development of pupils in the areas where they demonstrate most intense interest.

In particular, the principal aims of general education as expressed in the previous mentioned legislation, are to:

- facilitate the physical and spiritual development of pupils, their successful orientation, adaptation and fulfillment in society;
- create conditions for value formation connected with feelings of Bulgarian national identity, respect of others, empathy and civic responsibility;
- create conditions for development of needs, interests and attitudes to lifelong learning and education and self-perfection.

The new curriculum framework adopted in 1999 (MES, 1999e) and implemented since then gradually in all grades of secondary education, encompasses three types of education: A. compulsory (CE), B. compulsory-elective (CEE) and C. elective (EE) (see Annex 9: Study plan for general education 1999-2000).

Compulsory education provides the attainment of the general education minimum, which is compulsory for all schools and is the basis of general comprehensive education. Compulsory class periods include compulsory and compulsory-elective education, and at secondary education level, they can't exceed the 32 class periods per week.

Compulsory-elective education provides additional instruction within the academic subjects from the curriculum areas corresponding to the interest and individual abilities of the pupils. The share of compulsory-elective education in the upper secondary education is between 45% to 80% of the compulsory class periods.

Academic time for compulsory-elective education in the upper secondary education is used for general, profile-oriented and vocational training, while in vocational schools and vocational high schools it is used for compulsory vocational training and compulsory-elective general and professional training. In sports and arts schools, compulsory-elective education is used for specialized education in the respective sports and arts.

Depending on the level of education, compulsory elective subjects range between 10% and 50% of the total load. In upper secondary education for instance, 50% of the curriculum consists of compulsory elective subjects. While progressing within the education system, the number of hours attributed to compulsory elective subjects is being increased (see Table 8.9 and Annex 14).

TABLE 8.8 WEIGHT OF COMPULSORY AND COMPULSORY ELECTIVE SUBJECTS

Education level	Compulsory	Compulsory elective subjects
Primary education	90%	10%
Lower secondary education	89%	11%
Upper secondary education	50%	50%

Source: OECD, 2004a.

Elective education is not compulsory for pupils. It provides instruction in areas and activities offered by the school and elected by the pupils, which may be outside the eight main curriculum areas (see below). Its duration is up to four class periods per week for all grades in accordance with the Curriculum Act.

The new curriculum framework outlined eight curriculum areas to be covered in all Bulgarian schools (MES, 1999e):

1. Bulgarian Language and Literature,
2. Foreign Languages,
3. Mathematics, Informatics and Technology of Informatics,
4. Natural Sciences and Ecology (Physics, Chemistry, Biology, Geography),
5. Social Sciences and Civic education (History, Philosophy, Ethics, Civics, World and Personality),
6. Technology (Applied skills, Labor skills, Practical skills),
7. Arts (Music, Painting etc.),
8. Physical education and Sports.

The curriculum contains:

- the name of the academic subjects included in the compulsory, compulsory-elective and elective education;
- the allocation of academic subjects according to grades;
- the annual and weekly number of class periods for instruction in the separate subjects; and,
- the school year calendar.

Each curriculum presents:

- the objectives of the relevant subject;
- the expected results on study content cores;
- the syllabus with topics, concepts, context and activities, as well as interdisciplinary relations;
- specific methods and forms of assessment of pupils' achievements; and,
- brief methodological directions on the application of the curriculum.

Apart from the specific skills formation on separate academic subjects, the key group skills which are formed in all academic subjects should be also considered, such as: literacy,

numeracy, information handling, communication skills, critical thinking and problem solving, learning strategy.

Every school complying with the provisions of the Level of Education, General Education Minimum and Curriculum Act has the right and obligation to develop its own curriculum, the so called School-Based Curriculum (SBC) (see Annexes 10, 12 and 13: School-based Study plans). School curricula in the upper secondary education for the profile-oriented classes in the secondary comprehensive schools, as well as the arts and sports schools are developed on the basis of curricula endorsed by the Minister for Education and Science, after they have been synchronized with the respective government institutions (MES, 1999d).

The distribution of academic time according to subjects, grades, stages and levels of education for attainment of the general education minimum is stipulated in Ordinance no. 6 dated 28.05.2001 to which the curriculum is also applied (Ordinance no. 6/2001, art. 1) (see annexes 11 and 14).

The table below illustrates the weight given to each curriculum area in compulsory subjects in general comprehensive schools.

TABLE 8.9 CURRICULUM AREAS, 1999

Curriculum areas	1 st -4 th grade	5 th -8 th grade	9 th -12 th grade	1 st -12 th grade
1. Bulgarian language and literature	33%	19%	17%	23%
2. Foreign languages	9%	15%	16%	13%
3. Mathematics, informatics and ICT	14%	15%	16%	15%
4. Natural sciences and ecology	5%	14%	14%	11%
5. Social sciences and civic education	5%	11%	23%	12%
6. Practical skills and technology	5%	5%	0%	3%
7. Arts	18%	13%	3%	12%
8. Physical education and sports	11%	8%	11%	10%

Source: OECD, 2004a. p. 50.

As of in other European countries, emphasis is given on the *National language and literature* as well as *Mathematics*. *Bulgarian language and literature* predominates throughout the whole education system and particularly in primary education (33% grades 1-4) while its time space is being reduced progressively in upper levels (17% in upper secondary education, grades 9-12). The second most important curriculum area is *Mathematics, Information and ICT* whose weight is increasing slightly throughout the education cycle. *Foreign languages* occupy exactly the same space with *Mathematics, Informatics and ICT* in both lower (15% in grades 5-8) and upper secondary education (16% in grades 9-12). *Social sciences and Civic education* becomes the most important curriculum area in upper secondary education (23% in grades 9-12). The smallest importance is given to *Practical skills and Technologies*, which reflects the change in the labor market needs within the transition to a market economy (OECD, 2004a).

Within the last years, some curriculum areas became more important than others. For instance, the philosophical cycle became more important: *Psychology, Legal education, general Philosophy* and *Ethics*. These subjects have gained more time and space in the current curriculum. In contrast, time devoted to subjects such as *History* and *Geography* has been decreased (see Annex 11).

8.3.1 Social Studies after democratization

As we have already mentioned in chapter 7.3.1, within the curriculum area of social studies, we have chosen to present the curriculum of Geography.

In 1999-2000 under the new curriculum framework adopted with Regulation No 4 for Education Minimum and Class Hour Allocation in September 2, 1999 (MES, 1999e), *Geography* is studied within the curriculum area of “Public Sciences and Civic education”. In the first grade of primary education is being studied through the subject of *Introduction to geography* and *history of Bulgaria* for 31 weeks, while in secondary education is being studied through the subject of *Geography and economics* for 51 weeks in lower secondary education (grades 5-8) and 54 school weeks in upper secondary education (grades 9-10) (For the complete study plan see Annex 9).

In 2001, when the study plan was revised (MES, 2001d), no changes were implemented in the time allocation of this subject. (For the complete study plan see annex 11).

The core content of this subject is being divided into six topics (see the complete curriculum for Geography 9th grade in annex 5):

- Structure and natural resources of the Earth;
- Population and settlements;
- Political and economic organization of society;
- Geography of the world economy;
- Geographic regions and countries of the world;
- Geographic and economic information.

Students are given the opportunity to perform different activities such as to:

- discuss the modern structure of geography in view of its overall development;
- observe natural phenomena, typical for some geographic regions;
- watch documentaries on nature;
- work in a team;
- work with statistical information;
- work with documents and identify trends;
- work with geographic and thematic maps.

The content of this subject is linked to the content in *Physics, Biology, Chemistry, History, Literature, Philosophy* and *Mathematics*.

TABLE 8.10 EXAMPLE OF CURRICULUM ON GEOGRAPHY FOR 9TH GRADE , 2003

1	2	3	4	5	6
Core content	Expected results in view of the overall curriculum	Expected results in each topic	New concepts introduced	Context and activities	Interdisciplinary links
Core 1: Structure and natural resources of the Earth		<u>Students must master:</u> <u>Topic 1:</u> Development and modern structure of the geographic science <i>Expected results are listed in detail after each topic</i>	<i>New concepts, which students are expected to learn are listed for each topic</i>	<u>Students are given the opportunity:</u> 1. To discuss the modern structure of geography in view of its overall development 2. To observe natural phenomena, typical for some geographic regions 3. To watch documentaries on nature 4. To work in a team 5. To work with statistical information 6. To work with documents and identify trends 7. To work with geographic and thematic maps	<i>The content is linked to the content in physics, biology, chemistry, history, literature, philosophy, mathematics</i>
	<u>Standard 1:</u> - The student is able to identify and describe geographic regions and phenomena <i>Expected results in view of the overall curriculum are listed after each standard</i>	<u>Topic 2:</u> Geospheric structure of the Earth			
	<u>Standard 2</u> - The student is able to identify typical natural resource distribution patterns and the link between them	<u>Topic 3:</u> Natural components and complexes on Earth <u>Topic 4:</u> Impact of human economic activity on nature			

Source: Translation of official curriculum, MES, 2003f

8.3.2 Humanities after democratization

a) *Bulgarian language and literature*

The new curriculum of the *Bulgarian language and literature* changed significantly under the new curriculum framework adopted in 1999 (MES, 1999e). This subject is now split into two separate subjects: the *Bulgarian language* and the *Bulgarian literature*.

The new curriculum of both subjects is presented in 6 columns which from the left to the right comprise: the core content, the expected results in view of the overall curriculum, the expected results in each topic, the new concepts introduced, the context and activities and the possible interdisciplinary links with other subjects (see table 8.11 for an example on the curriculum of Bulgarian language for 9th grade and annex 2 for the complete curriculum of the 9th grade).

The core content is presented in terms of competences included the 4 main competences.

For the case of Bulgarian language these are:

- socio-cultural competences
- language competences
- socio-cultural and language competences in oral communication
- socio-cultural and language competences in written communication

For the case of Bulgarian literature the core content is divided in (see table 8.12 and annex 3):

- socio-cultural competences
- literacy competences
- socio-cultural and literacy competences: communicating with a literacy work
- socio-cultural and literacy competences: producing oral statements and written texts.

Each core content comprises one or more topics to be covered and its expected results. The expected results in view of the overall curriculum are also expressed in terms of national standards indicating the knowledge and abilities that students should acquire. More than one

standards can be achieved through the core content. The 4th column indicates the new concepts introduced while the 5th columns suggests the settings and activities students should be involved. The last column identifies the links that can be created with the other school subjects. In the case of *Bulgarian language* links can be established with civic education while the communicative competences developed through this subject are relevant to the whole curriculum. As far as regards *Bulgarian literature* this can be linked with *History* and *Philosophy*.

TABLE 8.11 EXAMPLE OF CURRICULUM ON BULGARIAN LANGUAGE FOR 9TH GRADE, 2003

1	2	3	4	5	6
Core content	Expected results in view of the overall curriculum	Expected results in each topic	New concepts introduced	Context and activities	Interdisciplinary links
Core 1: Socio-cultural competencies	Standard 1: <ul style="list-style-type: none"> • The student is able to use adequately different language registers • The student is able to identify the specifics of different texts: academic, scientific, media, artistic, civic and institutional • The student has knowledge of the structural, compositional, and linguistic characteristics of texts, typical of different types of communication. 	Students must master: Topic 1: Text and socio-cultural context <ul style="list-style-type: none"> • components in a communicative situation – participants, objective, topic, subject, conditions • the function of texts in communication; intention and tasks of communication. Topic 2: Texts in interpersonal communication <ul style="list-style-type: none"> • specifics of interpersonal communication • spheres of interpersonal communication: communication in the academic, media, civic, institutional, and artistic sphere. 	socio-cultural context interpersonal communication civic and institutional sphere function of texts – purpose and pragmatism	Students are given the opportunity: <ul style="list-style-type: none"> • to monitor, analyze, and participate in different communicative acts and situations of public communication 	<ul style="list-style-type: none"> • The knowledge and skills on text specifics and communicative functions develop students' ability to understand, interpret, and produce texts in all other subjects included in the curriculum. • The knowledge and skills on the socio-cultural context and the spheres of interpersonal communication integrate the course in Bulgarian language and literature into the overall interdisciplinary subject area of Civic Education.

Source: Translation of official curriculum, MES, 2003d

**TABLE 8.12 EXAMPLE OF CURRICULUM ON BULGARIAN LITERATURE FOR 9TH GRADE ,
2003**

1	2	3	4	5	6
Core content	Expected results in view of the overall curriculum	Expected results in each topic	New concepts introduced	Context and activities	Interdisciplinary links
Core 1: Socio-cultural competencies	<p>Standard 1: • The student understands the role of ancient civilizations as a basis for a universal system of values</p> <p>Standard 2: The student realizes the role of Christianity in the development of the European cultural model</p>	<p>Students must master:</p> <ol style="list-style-type: none"> 1. The link between the cosmos, the community and the individual 2. The key tales of the Antiquity: <ul style="list-style-type: none"> - the tale of Prometheus - the tale about the curse of the House of Atreus - the story of Oedipus - the story of Moses - the story of Joseph and his brothers <p>Students must master:</p> <ol style="list-style-type: none"> 1. Christian ethical norms 2. The impact of Christianity on the development of the European cultural model 	<p>cosmos, community, man, common good</p> <p>Christian ethical norms love forgiveness sacrifice</p>	<p>Students are given the opportunity:</p> <ol style="list-style-type: none"> 1. To comment on the studied works, analyzing the main moral conflicts and making a reference to modern ethical norms. 2. To identify intransient values and norms in the tales of the Antiquity 3. To comment on the influence of ancient ethical norms on the subsequent development of European societies. <p>Students are given the opportunity:</p> <ol style="list-style-type: none"> 1. To comment on the model of behavior embodied in biblical stories 2. To comment individual evangelical texts in which Christian ethical norms are best presented. 3. To identify the impact of Christianity on the subsequent development of the European civilization 	<p>The content in literature, complemented with the content in history and philosophy, gives students the opportunity to acquire a comprehensive idea of the moral and ethical norms in the Antiquity and their role for the development of European culture and spirit.</p> <p>The content in literature, complemented with the content in history and philosophy, helps students understand the role of Christianity in the development of the European moral values.</p>

Source: Translation of official curriculum, MES, 2003e

b) French language and literature

The new curriculum for *French language and literature* implemented from 1999 and onwards seems to apply more with the Common European Framework of Reference for Languages (CEFR) officially launched in 2001⁶⁹ (Council of Europe, 2001a). The CEFR is a document which describes in a comprehensive manner:

- the competences necessary for communication;
- the related knowledge and skills;
- the situations and domains of communication.

It pays particular attention to socio-cultural components or learner autonomy, by pinpointing a possible definition for the concept of “learning to learn” and “learning by doing”. It is still based on the four basic skills as it used to be the old curriculum but the whole organization of the curriculum varies significantly. For each of the four main skills to be developed, the curriculum presents: the core content to be covered; the expected results in view of the overall curriculum; as well as the expected results in each topic; the new concepts introduced for the specific grade; and the different contexts and activities given to students. Finally the last column suggests the interdisciplinary links that this curriculum subject can have with other subjects, such as *Bulgarian language and literature; second Foreign language; History; Geography; Psychology and logic; Natural sciences and ecology; Mathematics and ICT; Music, and Arts.*

The linguistic aspects of the language are further analyzed. For example for the first time it is mentioned the chronological structure of a text, its temporal links, the conventionality, the

⁶⁹ Launched in 2001, the [Common European Framework of Reference for Languages](#) marked a major turning point in describing specifications of language-learning targets; they were no longer designated as “threshold” or “Waystage” or “Vantage level” (a level situated below and above the threshold level accordingly developed later on), etc., but by the appropriate six-level scale of the CEFR scale (A1 to C2). The CEFR has been disseminated far and wide and has been translated into approximately 30 languages. the french edition is published by Editions Didier: *Cadre européen commun de référence pour les langues: apprendre, enseigner, évaluer* - ISBN: 227805075-3 - www.didierfle.com. The CEFR has now become a common reference instrument for organizing language teaching and certification in many EU member States (Council of Europe, 2001a).

sequence of tenses and the narrative text (see table 8.13 and annex 7 for the complete curriculum of French language in 9th grade).

TABLE 8.13 EXAMPLE OF CURRICULUM ON FRENCH LANGUAGE AND LITERATURE AS A FIRST FOREIGN LANGUAGE FOR 9TH GRADE (2003)

1	2	3	4	5	6
Core content	Expected results in view of the overall curriculum	Expected results in each topic	New concepts introduced	Context and activities	Interdisciplinary links
LISTENING	<p>1. Students are able to grasp the general meaning of newspaper articles and excerpts of literary works when read to them with a normal speed and a standard pronunciation</p> <p>2. Students are able to understand in some detail conversations and oral statements</p> <p>3. Students are able to extract specific information from news reports, interviews and discussions</p>	<p>Students must be able:</p> <ul style="list-style-type: none"> - to understand news reports, interviews, discussions, songs, legends, myths; personal and phone conversations; announcements at railway stations, airports, etc. - to participate as listeners in conversations on issues related to free time, education and services - to identify the logical links in a conversation - to understand thematic texts on traditions, folklore, rituals, and festivities; on scientific and geographic discoveries; on cultural events - to understand and use properly the grammatical structures they have studied. 	<p>temporal links</p> <p>chronological structure</p> <p>conventionality</p> <p>sequence of tenses</p> <p>narrative text</p>	<p>Students are given the opportunity to:</p> <ul style="list-style-type: none"> - listen to texts spoken by native speakers - work with different sources of information (radio, TV, video, Internet, Vifax) - work individually, in small groups, or in a larger group - participate in projects - apply different listening strategies 	<p>The content in French language is linked to the content in the following subjects:</p> <ul style="list-style-type: none"> - Bulgarian language and literature - second foreign language - history - geography - psychology and logic - natural sciences and ecology - mathematics and ICT - music - arts

Source: Translation of official curriculum, MES, 2003c

CHAPTER 9. CONCLUDING REMARKS OF PART II

Bulgaria, a country often described as lying at the crossroads linking the East and West, one of the cradles of European civilization, and home to the world's oldest known writing system became a democratic country in 1989. This year marked the beginning of a radical socioeconomic and political transition in the country.

Passing through economic misbalance and ambiguity during the beginning of the transition period from centralized planned economy to market economy, the economy collapsed in 1996, due to lack of international economic support and an unstable banking system. Since 1997, the country has been on the path to recovery, with GDP growing at a 4% – 5% rate (see table 6.6), increasing macroeconomic stability and acquiring European Union membership. However GDP per capita still remains low in comparison to the other EU 25 MS (see figure 6.5). The attention dedicated to human capital development remains limited in the country, scoring low on the Human Development Index, well behind other member states which joined the EU in May 2004 (see figure 6.9).

The constantly decreasing and ageing population (see tables 6.5a and 6.5b) has an evitable impact on the downsizing of classrooms in schools and teacher/student ratio negatively affecting the prospects of the teaching profession. While employment rates have been increasing in Bulgaria at solid pace, and unemployment is decreasing, labor participation and employment in the country are still well below the EU 15 (see figure 6.10). Bulgaria is ranked at first among former transition countries for youth unemployment, while skill shortages become increasingly visible in specific sectors of the labor market including manufacturing, construction and selected areas in services.

Undoubtedly, these socioeconomic changes and challenges Bulgaria is facing today affect the education system not only in terms of financing shortages and low participation rates but mainly in terms of increasing knowledge demands and skill needs. Indeed, the Bulgarian government in early 90s realized the need for reforming the education system to address the new emerging needs and meet the increasing expectations. While making attempts to decentralize the governance of the education system and optimizing the school network, the

most pronounced changes were made in the school curriculum. A new national curriculum framework was adopted in 1999 accompanied by National Education Standards (see chapter 8.1.4). From providing merely vocational training under the communist regime, the new study plans in secondary education shift the focus on enhancing general education for all and developing life competences. New values and principles are included in the revised education content and textbooks, such as European citizenship, tolerance, living together peacefully, human rights; to mention but few among which aim to endorse the new democratic regime in Bulgaria. The ideological elements are gradually excluded from the curriculum areas of humanities and social sciences and the main aim of the education systems changes to become this of developing citizens prepared to live and work in the knowledge-based society of the 21st century.

However, it is well known that such changes need time and effort to be applied in practice and have a visible impact on the quality and relevance of the school education. What were the challenges faced by the Bulgarian stakeholders and civil society in implementing the new curriculum and up to what extent this is being successfully applied in secondary schools today nationwide, is the core subject of analysis in the third part of our study that follows.

PART III. IMPLEMENTATION PROCESS OF THE REFORM: THE VOICES OF DIFFERENT STAKEHOLDERS AND THE CIVIL SOCIETY

In the previous chapters, we have seen that Bulgaria has made significant progress in curriculum reform responding to the challenges of social cohesion and modernization of the economy. The educational content has been reviewed to ensure more choice and flexibility; to integrate regional and international aspects; to intensify foreign language and civic education teaching; and to remove ethnocentric, racist and xenophobic biases, as much as possible for the time being.

However it is well known that curriculum reform not only implies a change in curricular content but also a change in the organization of the content itself; a change in teaching methods and educational practice; a change in ways of thinking about basic and practical issues of educational processes; a change in the assessment of its effects and results. A potential lack of harmonization of the new educational content with adequate teachers' training, students' assessment, school inspection and textbook practice can undoubtedly create mismatch among intended, delivered and achieved curricula. This gap between theory and practice may significantly decrease the potential positive impact of a curriculum reform on the quality of education.

It is not well known how complementary policies and interventions in the areas of teachers' training, assessment, school supervision and provision of teaching materials were implemented in Bulgaria in order to support the introduction of the new curriculum. This third part of our study is an attempt to fill this gap and to help identify good practices and derive lessons from shortcoming of policies and implementation strategies. The findings of our study in turn could be used during the implementation of ongoing and future reforms in the country as well as in the broader region of Balkans.

This part comprises chapters 10-12 and is dedicated on the views of the different actors involved in the Bulgarian education system. In particular, the tenth chapter describes the protocol of the investigation: the field of work, the elements of our investigation, the

investigation tools used to carry out the research and the different informants contacted, whose point of views constituted the basis for our analysis. The eleventh chapter addresses specifically the views of different stakeholders and the civil society on the implementation process of the curriculum reform, illustrating both achievements and gaps. The twelfth chapter puts in the centre of the study the teacher, analyzing recent changes implemented in teachers' formation system and the expected competences teachers should display to cope with the new curriculum.

CHAPTER 10. PROTOCOL OF THE INVESTIGATION

The following four sections provide information on the protocol of the investigation applied in order to analyze and valorize the implementation of secondary curriculum reform in Bulgaria. In chapter 10.1, both the investigation and geographical fields of the present study conducted on the concrete case of Bulgaria are being described. The chapter 10.2 presents the different topics of interest, which are significantly interdependent at the time of implementing a curriculum reform. The chapter 10.3 presents and discusses the research tools developed and used in order to collect necessary information at national level. Finally, the last chapter 10.4 presents the selection of the informants i.e. the actors addressed who consisted the main source of our information.

10.1 FIELD WORK

While the desk research carried out covers a comparative study of trends on secondary curriculum development in OECD countries and in the countries with transitional economies of the Balkan region (see chapter 1.5), the field work of the study focuses on Bulgaria (България).

10.1.1 Geographical field

As far as regards the geographical coverage of the field work carried out in order to examine the secondary curriculum reform and its implementation in Bulgaria, it is not only limited in Sofia, the capital of Bulgaria, but it is expanded in 46 cities covering virtually the whole territory of Bulgaria. These are: Archar (Vidin District⁷⁰), Barkachevo (Biala Slatina District), Biala (Rousse District), Blagoevgrad, Bourgas, Chernoochene (Kurdjali District), Dimitrovgrad, Dobrich, Gabrovo, Gorna Oriahovitsa, Gotze Delchev, Harmanli (Haskovo District), Haskovo, Kozloduy (Rousse District), Kurdjali, Kyustendil, Lom, Lovech, Mezdra (Vratza District), Mizia (Vratza District), Montana, Okorsh (Silistra District), Pazardjik, Peshtera (Smolyan District), Pleven, Plovdiv, Razgrad, Razlog, Rousse, Shoumen, Silistra, Simitli (Blagoevgrad District), Sliven, Smolyan, Sofia, Sokolare (Biala Slatina District), Sozopol (Bourgas District), Stara Zagora, Svishtov, Turgovishte, Varna, Veliko Turnovo, Velingrad, Vidin, Vratza, and Yambol.

In this way our study is representative in geographical and social terms covering both urban and rural areas, as well as more developed and less developed cities. For a presentation of the Bulgarian territory according to its Municipal Human Development Index (MHDI) see the table below.

⁷⁰ For clarity, smaller towns and villages are shown with the district they belong to, written in brackets.

TABLE 10.1 DIMENSIONS OF THE MUNICIPAL HUMAN DEVELOPMENT INDEX IN BULGARIA

DIMENSIONS	Low MHDl	Medium MHDl	High MHDl
Thresholds	Lower than 0,730	From 0,730 and 0,770	0,771 and above
Number of municipalities	82	141	39
Rural/urban distribution	Predominantly rural <i>Typical cases: Opaka, Zavei</i>	Recently urbanised areas (received the urban status in the last 4-5 decades) with the exception of the district centres <i>Typical cases: Strajitza, Sozopol, Yablanitza</i>	Predominantly urban or in case of rural – with intensive agro-production <i>Typical cases: all district centres with high MHDl (City of Sofia, Veliko Turnovo, Plovdiv) and Suhindol</i>
Territory	Predominantly small and isolated municipalities <i>Typical cases: Kaynardja, Djebel</i>	Small municipalities with deteriorating infrastructure or district centres in industrial decay <i>Typical cases: Vidin, Pernik, Yakoruda</i>	Big or small municipalities which are part of infrastructure networks or have certain competitive advantages (tourism, diversified production, major highway, foreign investment). <i>Typical cases: Burgas, Primorsko, Bansko</i>
Economic base and sustainability of HD conditions	Dependent on 1-2 local industries. Highly vulnerable to any changes in the economic environment <i>Typical cases: Rakitovo, Kotel, Saedinenie</i>	More developed small and medium business. Larger businesses on decline usually facing liquidation <i>Typical cases: Pazardjik, Vidin, Asenovgrad</i>	Usually diverse economic landscape with high share of services. In the cases of small municipalities, presence of viable centres of growth dynamizing economic conditions <i>Typical cases: Sofia, Sevlievo, Ruse</i>
Ethnic composition	High concentration of ethnic minorities <i>Typical cases: Ruen, Chernoochene</i>	Medium concentration of ethnic minorities <i>Typical cases: Kyustendil, Etrapole, Roman</i>	Low concentration of minorities, except municipalities with Roma populated "poverty pockets". <i>Typical cases for low concentration of minorities: Smolyan, Troyan. Typical case for municipality with high MHDl and minority "poverty pockets": Plovdiv</i>
Educational levels	Low (with weak links to labour market) <i>Typical cases: Kirkovo, Momchilgrad, Djebel</i>	Medium, but declining <i>Typical cases: Tervel, Kavarna</i>	Generally high. In some cases high educational levels are the major factor for high MHDl <i>Typical cases: Veliko Tamovo, Svishtov, Polski Trambesh</i>

DIMENSIONS	Low MHDl	Medium MHDl	High MHDl
Level and conditions of productivity	Lower productivity, labour intensive, monosectoral production base. Limited opportunities for negotiation of better labour conditions, limited mobility opportunities reduced to emigration/migration. <i>Typical cases: Tvarditza, Isperih, Krumovgrad</i>	Medium levels of productivity, more diverse sectoral distribution, slightly higher opportunities at the labour market (although still limited labour mobility) <i>Typical cases: Stara Zagora, Targoviste</i>	Medium and high levels of productivity, developed service sector, high opportunities for labour mobility <i>Typical cases: Sofia, Varna</i>
Subsidies dependence	High in all cases (most of municipalities would have fallen well below the current MHDl values without the redistributive component) <i>Typical cases: Hayredin, Dimovo, Kocheimovo</i>	In general, subsidies are not as high, but they still weight heavily in the budget (some municipalities would move into lower range without subsidies) <i>Typical cases: Ardino, Vetrino, Knezha</i>	Generally low with several exceptions . (Note: Some municipalities would move into lower range without subsidies) <i>Typical cases for non-subsidized high MHDl: Suhindol, Lyaskovetz, Pleven</i> <i>Typical cases for subsidized high MHDl: Dryanovo, Razlog, Smolyan</i>
Unemployment	High reaching critical levels <i>Typical cases: Dimovo, Bregovo, Borino</i>	High <i>Typical cases: most of the small and medium towns in this range</i>	Generally low with the exception of municipalities with high levels of subsidy dependence. <i>Typical cases for low unemployment: Sofia, Plovdiv</i> <i>Typical cases for higher unemployment and high MHDl: Tamovo, Smolyan, Montana</i>

Source: UNDP, 2000.

10.1.2 Educational field

Our case study focuses on curriculum policy development and administration of public general secondary education. We have already explained the reasons for which we have selected to study the policy development of this educational level in particular, which also explains the growing significance and attention paid nowadays on secondary education at international level (see chapters 1.1, 1.2 and 1.3). While, in fact, today, secondary education is a focus of increasing policy debate and analysis worldwide, for the concrete case of Bulgaria, it is even more significant.

One of the strengths of Bulgarian education is that the school system is capable of providing schooling for the vast majority of children up to the age of 16. The schools network created in socialist times has been maintained, and there is no lack of schools or teachers. However, true equality of educational opportunity is not simply a matter of provision; it has four main components: equality in access to, survival in, treatment during, and life chances as a result of education. Not all children in Bulgaria are equal in all four and what is even more worrying, is the decreases in the school attainment at secondary level. While access to the first four grades of primary education, grades 1-4, is virtually universal (gross enrolment rates stands at 102%), gross enrolments in grades 5-12 (including lower and upper secondary levels) decrease to 87% (grades 5-8) and 68% (grades 9-12) (OECD 2004, p. 102). This is particularly worrying for grades 5-8 which are still part of compulsory education. Improving quality and relevance of secondary education is key for retaining students in schools and decreasing drop out rates.

We have seen that Bulgaria, together with Romania, scores low on the Human Development Index (HDI) respecting to other European countries (see chapter 6.2.2). In addition, the outcome indicators of educational achievement are lower than those of the OECD and other EU members (World Bank, 2007c, p. 41). To maintain productivity growth, enhance competitiveness, and address skill mismatches, Bulgaria would need to invest more effectively, in building, maintaining and protecting its human capital pool in a fiscally sustainable manner. Secondary education in particular, which is both terminal for those who would like to enter to the labor market, and transitional for those who continue to higher

education, requires special attention. Improving the efficiency and efficacy of secondary education should be seen as priority of the education sector modernization agenda.

Within the secondary education policy in Bulgaria, we focus more on curriculum policy development and implementation (see chapter 1.3). Once a country becomes democratic, as is the case of Bulgaria, it is to be expected that within the radical changes occurred at the national institutional structures and their functions, public services such as the educational system also witness important changes. The immediate change that usually occurs in this field is the revision and clearance of the educational content from ideological ideas and socialistic burden.

While this study begins by presenting general trends in secondary curricula reforms in all the subjects covered under secondary schooling, special attention is given to curriculum areas of social studies and humanities. We have already referred to the crucial importance that these curriculum areas have nowadays in transmitting values and principles and in formatting pupils' personality (see chapter 1.4). We have also explained that these curriculum areas while they are not alone in completing this mission, they are the only curriculum areas that allow us to examine more easily the evolution of their content during the time and the inclusion of new values and principles. This is because their content is highly interdependent and affected by sociopolitical and economic changes. For the particular case of Bulgaria, a transitional country which passes from a socialist state to a democratic one and from a regulated economy to an open market economy, these two curriculum areas have special significance for the formation of citizens minds and the preparation of workers for the new labor market reality.

10.1.3 Institutional field of informants

The main institutions that we selected to visit or contact were the following:

- The Ministry of Education and Science (MES) in Sofia responsible for designing secondary curriculum reform and planning its implementation (see more in chapter 8.1.1).
- The regional Inspectorates on Education in: Blagoevgrad, Bourgas, Dobrich, Gabrovo, Haskovo, Kurdjali, Kyustendil, Lovech, Montana, Pazardjik, Pleven, Plovdiv, Razgrad, Rousse, Shoumen, Silistra, Sliven, Smolyan, Sofia, Stara Zagora, Turgovishte, Varna, Veliko Turnovo, Vidin, Vratza, and Yambol (26 out of the 28 that exist in Bulgaria. The regional Inspectorates on Education are responsible for the quality monitoring of secondary schools including teaching processes, school environment, students and teachers' performance, etc.
- Three non-governmental organizations in public interest placed in Sofia: two of them, the Paideia Foundation founded in 1999 (<http://www.paideiafoundation.org/>) and the Open Society Institute and Soros Foundations Network (<http://www.soros.org/about/foundations/bulgaria>), are involved in educational research, analyzing the impact of the curriculum reform and developing and implementing related pilot projects, supporting the modernization of the Bulgarian education system, and the other one is specialized in children with special education needs.
- The Syndicate of Bulgarian Teachers in Sofia, which is the largest teachers' association in Bulgaria with more than 100.000 members. According to the Labor Code⁷¹ (Labor Code. Promulgated, the State Gazette, No. 26 & 27/1986), trade unions are a party to the collective labor agreements and may negotiate and sign such agreements on behalf of the teachers. The trade unions stand their platforms and place demands on social, economic, labor and legal issues; suggest amendments to laws and regulations, as well as the management decisions, which are unfavorable

⁷¹ The Labor Code is a main statutory instrument of the Republic of Bulgaria regulating employment relations and social dialogue among the three parties in the labor process: the government, employers and employees/workers. It aims to ensure freedom and protection of labor, fair and worthy working conditions.

for the teachers. Unions are also allowed to stage protests and to launch industrial actions if other means of solving disputes prove unsuccessful. Trade unions are other organs that assist and negotiate better working conditions and payment for teachers and provide representation of the teachers' professional and social interests. Unions of at least 50 000 members are considered representative.

- Secondary education schools, both comprehensive and profile (elite) schools in 46 different towns representative of both small, medium-sized, and large communities (see chapter 10.1.1 for the list of countries).
- The University of Sofia responsible to prepare future teachers and to provide in-service training for secondary education teachers. This is the biggest University in the country providing pre-service training for future teachers and one of the three institutions in Bulgaria that provide continuing training for teachers; the other two are located in Stara Zagora and in Varna. Pre-service training is compulsory in order to teach to secondary schools in Bulgaria while in-service training is optional and is aimed for either career progression or new competences development.
- The major publishing house responsible to publish school textbooks, “Colibri Publishers” founded in 1990 and located in Sofia and the Association of the Bulgarian textbooks publishers (<http://www.colibri.bg>).
- The Bulgarian Industrial Association (BIA): a nationally recognized organization of the employers as regulated in the Labor Code, it is a non-profit-making association, non-governmental organization of the Bulgarian industry, established on 25 April 1980. The membership of the Association involves 87 branch (sector) organizations, 26 regional organizations and 58 local bodies, the Bulgarian Academy of Sciences, universities and scientific and technical unions, the Central Cooperative Union, over 15 000 commercial companies, out which 263 are among the largest 300 companies in Bulgaria. BIA is responsible to determine the economic policy in Bulgaria; develop and improve the regulatory base related to the economic activity; prepare analyses, studies, and expertise assessments in the area of the industrial, tax and social policy, environmental protection, technical requirements to the products, development of the small and medium-sized enterprises, etc. BIA also provides

professional training and qualification in 35 professions in over 60 specialties through its Center of Vocational Training (<http://www.bia-bg.com/>).

10.2 ELEMENTS UNDER EXAMINATION

There are many parameters to be considered while designing and implementing a curriculum reform. One of them is to bring on board all the stakeholders involved directly or indirectly in such reform as well as the broader society: parents, students, unions, NGOs, educational associations and research centres. To do so, the motivation behind an educational reform, its objectives and potential beneficial outcomes should be broadly communicated to the public. Another parameter is to decide the accompanying changes in those sectors that can support the curriculum reform.

A curriculum reform can have a direct or indirect impact in the daily function and organization of the educational institutions. It can affect the teaching-learning methods in use, the school environment, the relationships between teachers, parents, students and school directors, the attitude of teachers and students, etc. Indeed, to be successful, the curriculum reform should have a positive impact on all these areas. Given though those teachers are the principle actors for the successful implementation of this reform, we decided to give special attention to this ambit.

Bearing this in mind, we have selected to examine two sets of issues:

- the ambits and actors of secondary curriculum reform in Bulgaria (see chapter 11);
- the impact of the curriculum reform on teacher education and training (see chapter 12).

10.2.1. Ambits and actors of secondary curriculum reform in Bulgaria

The first set of elements comprises the curriculum reform itself and those topics that have crucial implications in its implementation:

- a) the actors involved in the curriculum reform;
- b) the curriculum reform during the democratization and up to date;
- c) the students' evaluation and assessment system;
- d) the textbook policy; and,
- e) the quality monitoring system through school inspection.

By analyzing the curriculum reform and its accompanying supportive measures adopted in the fields of students' assessment and evaluation, textbook policy and quality monitoring, permit us to examine on one hand the problems encountered during its implementation and on the other, to identify those interrelated areas to curriculum delivery that lacking development and/or harmonization with the new educational content. By identifying both challenges faced and lacks or delays in the implementation of the curriculum policy as well as good practices will enable us to endorse the conclusions of our study with adequate policy recommendations for further improvements. In the same time, the conclusions of our study can be of great relevance to other transitional countries undergoing similar reforms.

It is also worth mentioning that contemporary secondary education reforms efforts worldwide tend to focus on the above-mentioned ambits due to their significance for a successful curriculum reform. These issues also constitute the main elements of intervention of the first component of the "Education Modernization Project" funded by the World Bank, (World Bank, 2000a) through which most of the educational reforms took place in Bulgaria (see chapter 11.1).

The second set of elements concerning the impact of the curriculum reform on teachers' education and training is presented below.

10.2.2 The impact of the curriculum reform on teacher education and training

The second set of elements under examination are meant to analyze the implementation of the curriculum reform from the perspective of teachers' education and training, looking on the impact that the reform has on the competences and qualifications required for secondary education teachers to teach under the new curriculum. Within this category, we have examined the following three specific areas:

- a) the pre-service teachers' education and training provision;
- b) the in-service teachers' education and training provision; and
- c) the required teachers' competences and qualifications as perceived from the different actors concerned.

By examining the way teachers are being prepared and supported to deliver the new school curriculum, we can foresee the degree of success of the implementation process. At the time when the Ministry of Education and Science in Sofia is developing a new National Qualification System for teachers and several attempts to reform teachers' training system are taking place, the analysis of this ambit is even more significant.

Our findings could contribute to the (re)orientation of the planned reforms on teachers' education and training to address the most crucial issues, enabling the different stakeholders involved in the implementation process to have a clear idea of those competences considered important for secondary education teachers by the Bulgarian society.

10.3 INVESTIGATION TOOLS

In order to gather information on the above-mentioned topics two investigation approaches were used. The first was to conduct interviews with all the informants concerned and the second to administer a multiple-choice questionnaire across Bulgaria. For the former case, a comprehensive questionnaire with open questions was developed while for the latter a rating instrument listing the key competences for teaching in the knowledge-based society was designed. The following two sections 10.3.1 and 10.3.2 present in detail these two investigation tools.

It is important to highlight that these two approaches allow us to gather and examine the opinions of the different stakeholders involved in the curriculum reform and the civil society from a different point of view. While these approaches differ, they are also complementary one to another. They differ from the point of view that while the interview is open and spontaneous, the multiple-choice questionnaires are more focused and precise. Both of them present advantages and disadvantages at the time of interpreting the findings.

On one hand, the interviews allow us to capture and examine the spontaneity of the interviewees who are free to express their own opinion and all the paralinguistic elements, which reveal their affection, their criticism and give us a more natural and complete idea of the informants' opinion. However, it permits only to do a qualitative analysis of the findings, which are always subjective and often vague.

On the other hand, the multiple choice questionnaires are more focused in the objectives set and precise defining better the areas that we need to examine. They allow the unification and harmonization of the answers and the quantitative and statistical treatment of the findings, facilitating in this way their interpretation. However, often the answers given in a multiple-choice questionnaire are conditioned and limited by the choices offered as replies, which may not correspond to the real or concrete point of view of the informant. It is not rare also for the informants called to reply to a multiple-choice questionnaire, to choose this reply that they feel is the "correct" answer, rather than what they really believe is the case.

By using both approaches, we can benefit from the advantages that each process presents and limit their disadvantages, receiving a more holistic and complete idea of our informants' points of views.

10.3.1 Personal interviews

As we have mentioned above, it was considered essential to conduct personal interviews with the key informants. The interviews were opened but based on pre-defined questions that were used in order to guide and focus the conversation on the necessary points. The interview questions differed depending on whom they were addressed to. However, in one form or another they all dealt with issues regarding the background set of the reform, the implementation of the reform and the current status. In continuation, they are presenting the questions addressed according to the group of informants (for more information on the informants contacted see chapter 10.4.1).

The questions were designed for the different target groups according to their functions and role with respect to the curriculum reform. Three main categories of target groups were identified: a) the group of educators, b) the civic society and c) the group of administrative staff and policy makers. The composition of these categories and the reasoning behind their selection is described in detail in chapter 10.4.1.

- a) The main questions addressed to the group of informants comprising the *educators* include questions related to:
- the degree and type of participation of the educators in the decision-making process of the curriculum reform and its implementation;
 - the possible resistance from the part of educators encountered during the design and/or implementation of the new curriculum and the incentives and support given to them for their active participation in the reform;
 - the problems faced in order to teach under the new curriculum and the new textbooks;

- the consequences of the curriculum reform on the autonomy of teachers, their teaching methods and interaction with students, parents and inspectors;
- the benefits of the curriculum reform and its impact on the content quality, the school textbooks and students' assessment practices;
- the quality of pre-service and in-service training for future teachers and its relevance to the new curriculum.

b) The questions addressed to the group comprising the *administrative staff and policy-makers* were the following:

- the way the several reforms have been communicated to the public and the measures adopted to enhance public dialogue;
- the role and responsibilities of the different actors for the preparation and execution of the reform;
- the main reforms implemented in order to support the introduction of the new curriculum and new educational standards (e.g. on teachers' training, students' assessment, quality monitoring, textbook policy, etc);
- the challenges-problems-difficulties encountered at the time of the design and implementation of the curriculum reform (e.g. resistance encountered from different groups and ways to overcome; financial restrictions; lack of human resources, etc.);
- the research or sustainable mechanism developed, if any, in order to collect the feedback of the beneficiaries of the reform (e.g. students, teachers, etc.);
- the focus and priorities of the current and future educational policy in respect to secondary education curriculum (e.g. changes planning to implement on teachers training; school inspection; students' assessment, etc).

c) Finally, the following questions were asked to the group consisting the *social category* of informants:

- the extend to which the content of the present core curriculum is relevant to the needs and interests of secondary education students;
- the extend to which students in secondary education currently have freedom to choose the subjects they would like to study according to their needs and interests;
- the relationship/interaction between teachers and students and the degree of satisfaction of the students for the way they are being taught;
- necessary changes in the subjects or the methodology under which students are being taught;
- the relationship/interaction of students, parents, teachers and inspectors.

All questions were translated into Bulgarian and were made available to the interviewees before the interviews took place. All interviews -both individual and group interviews- were held in-person and were assisted by professional interpretation giving the opportunity to interviewees to express their opinion in their native language. In this way, the informants could reply spontaneously, while limitations arising from linguistic impediments and possible misunderstandings have been avoided.

All interviews were recorded to allow the revision of the written notes. A careful analysis of the transcriptions took place to uncover the common themes across all interviews and the differences in opinion about each one of the above-mentioned themes.

A part of the information collected through individual interviews, we have also examined politico-administrative and legislative documents, encountered in the Ministry of Education and Science in Sofia and facilitated by the interviewees. All consulted documents were translated into English for the purposes of the present study. The consultation of these documents helped us to complement and/or confirm the corresponding information collected during the interviews.

To further complement our study and neutralize the information gathered from the different actors, a rating instrument was also developed, presented in the following section.

10.3.2 Rating questionnaires

In order to gather information for the second set of elements referring to the impact of the curriculum reform on the teacher education and training, we developed a rating instrument consisting in two parts. The first part included a list of competences that should be rated according to their importance and relevance for the Bulgarian educators to teach under the modernized curriculum, preparing students to acquire these competences and skills indispensable for living in the knowledge based society of the 21st century and working in the highly competitive and unstable global labor market. The second part of the instrument consisted in four multiple choice questions asking informants:

- if Bulgarian teachers of secondary schools are adequately qualified and possess most of the listed competences;
- if the current *pre-service* education system prepares successfully the Bulgarian teachers to acquire the appropriate competences to teach in the knowledge based society of the 21st century;
- if the current *in-service* education system prepares successfully the Bulgarian teachers to acquire the appropriate competences to teach in the knowledge based society of the 21st century;
- in which group of teaching competences: *teaching domain competences*, *school domain competences* or *professional domain competences*, Bulgarian teachers are lacking training.

The opportunity to comment on the questionnaire and to listed competences was also given to them.

While the selection of the multiple-choice questions was quite an easy process, the development of the list of competences required a thorough examination and consultation of international literature and research conducted on the area of learning to teach.

Various competences related to the research we carry out have been defined and analyzed by different authors. The categories of competences that we have adopted for articulating our investigation are based on the concept of competency applied in the teaching profession, defined in the Recommendation of the European Parliament and of the Council on the

establishment of the European Qualifications Framework for lifelong learning⁷² as following:

“Competence” means the proven ability to use knowledge, skills⁷³ and personal, social and/or methodological abilities, in work or study situations and in professional and/or personal development. In the European Qualifications Framework, 'competence' is described in terms of responsibility and autonomy (European Commission, 2006).

A competence is always a competence for action and presents the following characteristics (Martinet, Raymond and Gauthier, 2001):

- It is developed in real, rather than simulated, professional contexts;
- It is situated on a continuum that ranges from the simple to the complex;
- It is based on a set of resources: a competent person makes use of resources mustered in contexts of activity;
- It concerns the capacity to mobilize in a context of professional activity;
- Competence, like know-how, is intentional;
- It is effective, efficient, and immediate know-how that is demonstrated continually;
- It constitutes a project, an endless goal.

⁷² The proposed Recommendation establishes the EQF as reference tool for the comparison of qualification levels in national qualifications systems as well as qualifications systems developed by international sectoral organizations. The EQF's main components are a set of European reference levels described in terms of learning outcomes, and mechanisms and principles for voluntary cooperation. It is recommended that Member States use the EQF as a reference tool to compare qualification levels used in different qualifications systems, relate their qualifications systems to the EQF by linking qualification levels to the corresponding EQF levels and, where appropriate, develop a national qualifications framework. This recommendation was adopted by the Commission on 5 September 2006 and was transmitted to the European Parliament for its adoption.

⁷³ 'Skills' means the ability to apply knowledge and use know-how to complete tasks and solve problems. In the European Qualifications Framework, skills are described as cognitive (use of logical, intuitive and creative thinking) and practical (involving manual dexterity and the use of methods, materials, tools and instruments) (European Commission, 2006/0163 (COD)).

The expected competences that secondary education teachers should have or acquire in order to transmit effectively useful knowledge⁷⁴ and values and help to the development of skilled students and workers, could be grouped in three main domains:

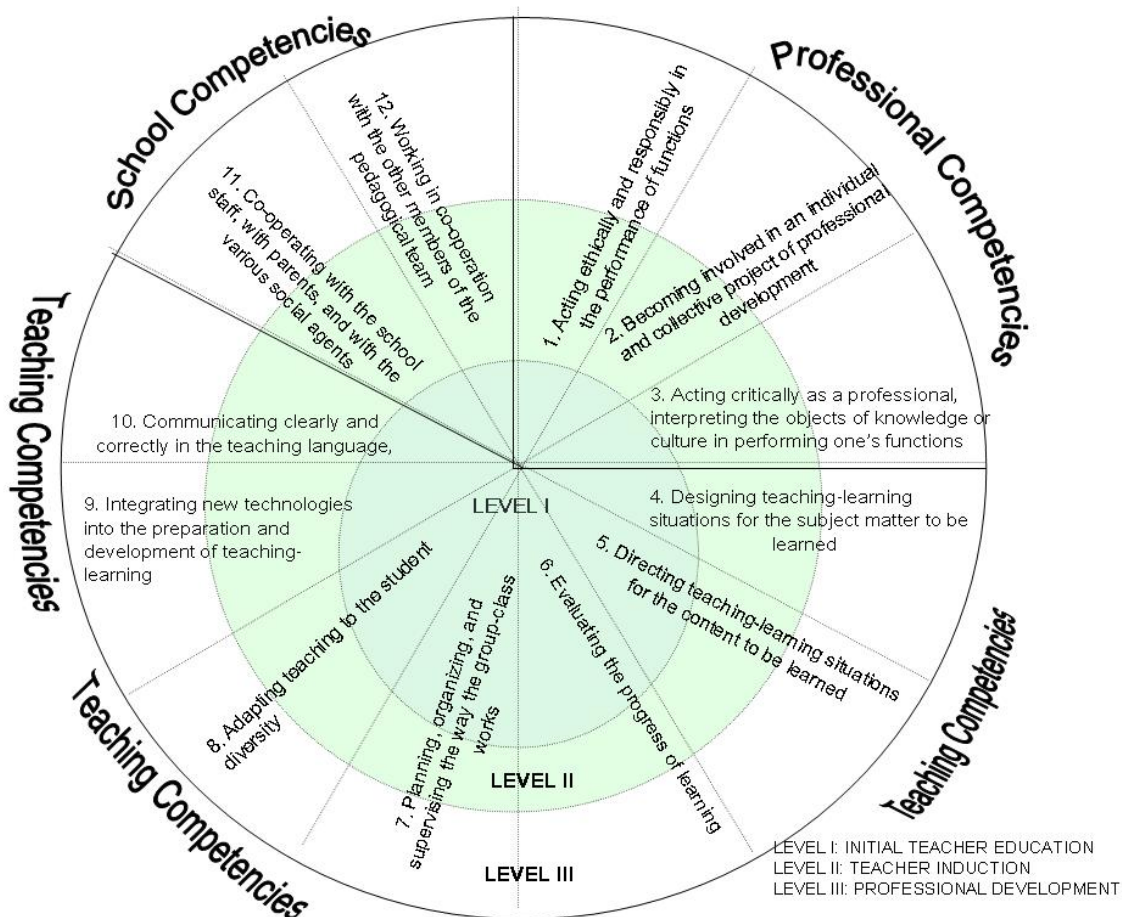
- a) competences related with the **teaching** and the **classroom** work;
- b) competences related with the **school** work;
- c) competences related with the teacher as **professional**.

Within these domains there are more specific categories of competences, which can also be further subdivided in more concrete skills.

According to the above mentioned authors, these competences can be mapped in a synoptic way through the following graph which tries to give an answer on how should be drawn the mapping of teaching competences and skills to match and respond to the new key competences that every student needs to acquire; which are the teaching competences and skills that should be incorporated into the curriculum of teacher training institutions; and which are those that should become the preferred focus of teachers' professional development activities and policies.

⁷⁴ 'Knowledge' means the outcome of the assimilation of information through learning. Knowledge is the body of facts, principles, theories and practises that is related to a field of study or work. In the European Qualifications Framework, knowledge is described as theoretical and/or factual (European Commission, 2006/0163 (COD)).

FIGURE 10.1 ROAD MAP OF TEACHER COMPETENCES FOR A KNOWLEDGE BASED SECONDARY SCHOOL



Source: Marcelo, 2004.

This map, enriched with findings and evidence of recent research, was adapted and supplemented later on by Marcelo (2004) for its application in six case studies conducted in: Chile and Mexico (from the region of Latin America), Senegal, Ghana (from Africa), and Vietnam and Cambodia (in East Asia), for the purposes of the preparation of World Bank's secondary education policy report (World Bank, 2005)⁷⁵.

⁷⁵ To which I have also contributed conducting working papers on the case studies of Bulgaria and Romania (see bibliography: Psifidou, 2003, 2004 and 2005).

This map could guide the development of programmes for teacher education. The three domains should be approached with different grade of intensity depending on the moment or formation level in which teachers belong. This way, we have differentiated three levels:

- Initial Teacher Education
- Beginning Teacher Induction
- Continuous Professional Development

The list of 12 basic competences could be part of any programme of teacher education, being this in initial teacher education, induction or continuous professional development, but not with the same intensity. These competences are also crucial in the specific case of Bulgaria who implemented a radical curriculum reform, introducing for the first time national education standards and specifying students' achievement in terms of competences developed during the learning process.

The competences related with the work of the teachers in the classroom are those that should be constituted in the axis of the initial teacher education, and this is why this is marked in our graphic with a wider circle. Research shows (World Bank, 2005) the importance for the beginning teachers to acquire a repertoire of abilities and basic knowledge that allow them to begin their professional itinerary.

In continuation, the three main domains of competences and their subdivisions are being presented in numerical order. For the complete list of competences included in the questionnaire, see Annex 21.

A. Teaching domain

This domain contains the group of teaching competences which allude to the capacity of teachers to mobilize a variety of cognitive resources to face and deal with a specific type of teaching situation. Rather than a particular content or type of knowledge, teaching competences and skills integrate and articulate cognitive resources which are relevant to a given situation, and are constructed both through training and daily practice in the classroom. Teaching competences are common to every curriculum area and school level, as they cut across subjects and disciplines in all educational levels (Moreno, 2005).

- 1. Designing student-centred teaching-learning situations:** Mastering ways of representing and formulating the subject matter with the specific purpose of making it comprehensible to others and understanding of what makes the learning of specific topics easy or difficult taking into consideration students family and cultural background, abilities and prior knowledge (items 1, 2, 3, 8, 9, 13, 14, 15 and 16 in annex 23); Planning sequences of teaching and evaluation bearing in mind the logic of the content and of the learning process (items 4, 5, 6 and 7); Choosing varied and appropriate didactic approaches when developing the competencies included in the curriculum (items 10, 11 and 12).
- 2. Directing student-centred teaching-learning situations:** Creating the conditions for students to become involved in situations-problems and in significant topics or projects, bearing in mind their cognitive, affective, and social characteristics and making available to them the resources necessary in the learning situations proposed (items 17 and 23); Presenting the subject matter in networks of knowledge structured around powerful ideas, guiding students in selecting, interpreting, and understanding the information provided and giving them sufficient opportunities to practice and apply what they are learning providing them with improvement-oriented feedback (items 18, 19, 20, 21, 22, 24, 25, 26, 27, 28, 29, 30 and 31).
- 3. Evaluating students learning and competences acquired:** Constructing or employing different instruments to enable evaluation of progress and acquisition of competences and skills and co-operating with colleagues for the improvement of the available pedagogical and didactic options (items 35, 36, 37, 39 and 40);

Communicating to students and parents, clearly and explicitly, the results achieved and the feedback concerning progress in learning and acquisition of competence (item 38).

4. **Planning, organizing, and supervising the way the group-class works:** Defining and applying an effective working system for normal class activities (items 41 and 42); Communicating clearly to students the requirements of correct school and social behavior, ensuring that they adopt them and adopting strategies to prevent incorrect behavior (items 43, 44, 45 and 46).
5. **Adapting teaching to the student diversity:** Participating in the preparation and implementation of a plan of adapted performance, designing learning tasks adapted to students' possibilities and characteristics (items 47, 48, 49, 50, 51 and 54); Helping the social integration of students with learning or behavioral difficulties (items 52 and 53).
6. **Integrating the technologies of information and communication:** Evaluating the pedagogical potential of ICT as medium for teaching and learning for society (items 55 and 56); Using the ICT effectively to set up networks of exchange related with the subject taught and its pedagogical practice (items 57, 58 and 59).
7. **Communicating clearly and correctly in the teaching language:** Using the appropriate oral language when addressing students, parents, or colleagues and constantly, seeking to improve oral and written experience (items 60, 61, 62, 63 and 65); Stimulate students to process and reflect critically on content and use it in problem solving, decision making, and other higher-order applications (item 64).

B. School domain

This domain includes the competences that teachers should display in order to build up a knowledge management system in schools functioning as learning communities which are capable of responding to the needs of students as citizens who have the right to learn.

8. **Enhancing co-operating among various agents to achieve the school's educational targets:** Co-operating with the other members of the school staff, the

parents and the students in the management of the school and its activities and projects (items 66, 67 and 68).

- 9. Working in co-operation with the other members of the pedagogical team:** collaborating with other members of the pedagogical team for the design and adaptation of teaching-learning situations and the evaluation of learning (items 69 and 70).

C. Professional domain

The debate about the professional, non-professional or semi-professional nature of school teaching has been going on for decades. This domain refers to the professional knowledge of teaching and teacher professional developments in terms of lifelong learning.

- 10. Acting critically as a professional:** Reflecting about practice and acting upon the results of such reflection (items 72 and 73); Explaining adequately the degree to which students achieved desired learning targets (item 74); Making the class a place open to multiple viewpoints and adapted to various cultural backgrounds (items 75, 76 and 77); Establishing relationships among different fields of the subject matter knowledge identifying the core issues and axes (items 71 and 78).
- 11. Becoming involved in an individual and collective project of professional development:** Evaluating one's own competences and adopting the means to develop them using available resources (item 79 and 81); Exchanging ideas with colleagues about the suitability of pedagogical and didactic options (items 80 and 82).
- 12. Acting ethically and responsibly in the performance of functions:** Respecting the confidential aspects of the profession and acting ethically and responsibly in difficult circumstances (items 83, 84, 85, 86 and 91); Encouraging democratic conduct in class, avoiding all forms of discrimination (items 87, 88, 89, 90, 92, 93, 94).

In order to carry out the study and ensure high accuracy of the information collected, the rating instrument was translated into Bulgarian including a cover page where the framework and objectives of this study were explained (see Annex 21 for the complete version of the questionnaire).

English text

Dear interviewee,

*This is a study conducted by Irene Psifidou, a PhD student with the support of the World Bank and the Greek Government. Since the development of national standards for the teaching profession is a high priority in education policy worldwide, this study seeks to identify which teaching competences for **secondary** education teachers (**grades 8-12**), are considered important by different stakeholders and other interferes of the education system in Bulgaria.*

*The following list of competences is applicable to the profession of a teacher for **secondary school** and it has been designed based on an international list of teachers and competences and those included in the Standards of initial formation for teachers. Please indicate for each competence the level of importance that you consider for the development of competences required to cope with the knowledge based society: no important, indirectly important or directly important (that means indispensable to have or acquire a teacher).*

Bulgarian text

Уважаеми респонденти,

*Настоящото изследване е проведено от Ирини Псифиду, докторант, с подкрепата на Световната банка и правителството на Република Гърция. Тъй като разработването на национални стандарти за учителската професия е водещ приоритет в образователната политика в цял свят, изследването си поставя за цел да установи кои компетенции на упражняващите професията „учител в средния курс“ (**8-12 клас**) са най-важни според различните заинтересовани страни в българската образователна система.*

Приложеният списък от компетенции се отнася до упражняващите професията „учител в средния курс“ и е разработен въз основа на международноприети изисквания за квалификацията на учителите, както и въз основа на стандартите за първоначална квалификация на учителите. Моля, отбележете срещу всяка компетенция доколко важна е тя според вас за развитието на набора от умения, необходими на един учител в 21-и век, в така нареченото „общество, основано на знанията“: няма значение, има косвено значение или има пряко значение (тоест е абсолютно необходима за един учител).

Informants were also asked to indicate their professional title:

Директор на училище	<input type="checkbox"/>	School Director
Учител	<input type="checkbox"/>	Teacher
Представител на учителски синдикат	<input type="checkbox"/>	Teachers Syndicate
Началник на инспекторат	<input type="checkbox"/>	Head of Inspectorate
Инспектор/експерт	<input type="checkbox"/>	Inspector
Университетски преподавател	<input type="checkbox"/>	University Professor
Студент	<input type="checkbox"/>	University Student

The questionnaire was administered in 46 secondary education schools and 26 regional inspectorates across Bulgaria through the established network of the Paideia Foundation based in Sofia, as well as in the University of Sofia, the Ministry of Education and Science two NGOs and the Syndicate of Bulgarian teachers (see chapter 10.4.2 for the detailed list of informants).

201 respondents were asked to rate the “direct” or “indirect” degree of importance (scale of 1 = not important; 2= indirectly important; 3 = directly important) that developing each competency would have for secondary level teaching, and for organizing teacher education activities accordingly (for the detailed list of competences and their rating see annex 23).

To be able to interpret any statistical analysis, obviously, it is required to be adopted *ad hoc* a concrete rating scale. Taking into consideration the psychological and socio-cultural factors and variables that interfere in our particular investigation, the application of a natural statistical distribution (Curve of Gauss: Gaussian or normal distribution, see <http://mathworld.wolfram.com/NormalDistribution.html>) cannot reflect the reality. Therefore, in order to apply processes that have been proved significant, we have adopted the following rating scale applied in the case studies conducted by the World Bank in order to examine and valorize teacher education and training in different developing countries (World Bank, 2005):

- competences with a mean of 2.75 or higher are considered “directly” important; and
- those competences with a mean between 2.74 and 1.75 as “indirectly” important.

The responses given to the questionnaires allowed for a quantitative analysis based on a statistical elaboration carried out with the EXCEL statistical tool. The findings of this analysis are presented in chapter 12 that follows.

Below, the target groups selected to be interviewed and to reply to the questionnaire are presented in detail.

10.4 SELECTION OF INFORMANTS

As we have already explained in the previous chapter, the two investigation tools used to carry out the fieldwork in Bulgaria were addressing different but complementary purposes. To this respect two types of informants were also identified, those who had to respond to the interviews and those who had to complete the questionnaire. The second comprises most of the informants of the first one but it is further expanded. Below, the two types of informants are being described in detail.

10.4.1 Informants from interviews

In total, 96 individual interviews were held in-person: 92 of those took place during our two missions in Sofia of 20 days in total in November 2003 and September 2004, and 4 individual interviews with Bulgarian ministry officials were held in Bucharest in February 2007.

To identify the key people, a close collaboration took place with regional consultants-experts in the field of general education, who assisted the selection of the target group and the preparation of the meetings' agenda. The aim was to contact all kind of actors involved in the education system: policy makers, consulting bodies, implementing bodies, people who deliver the new developments and people who receive them (See annex 18 for a detailed list of interviewees organized according to their functions). To this respect, a

careful selection of key actors at central, regional and local levels was made, comprising three categories:

- a) the *social category* including 28 informants in total comprising: representatives from non-governmental organizations, parents associations, and students from secondary education and higher education;
 - b) the *category of educators* including 18 informants in total being teachers in secondary education schools, professors in higher education (universities) and trainers in in-service training for teachers; and
 - c) the *category of administrative staff* including in total 50 informants comprising: Ministry officials responsible for educational policy development, secondary school directors, unions' directors and inspectors from the regional inspectorate in Sofia.
- a) From the *social category*, either different kinds of social groups were interviewed who are observers and analysts of the educational policy, or they are themselves receivers of the formation. To this end, as most representative groups have been considered the following:
- 2 experts from two NGOs dealing with research on education: the member of the Board of *Paideia* foundation who worked on the elaboration of the new curriculum for *Civic education*, being also the author of textbooks in *History* and *Civilization*, and the education programme coordinator from the Open Society Foundation in Sofia;
 - the editor and manager of the *Colibri* Publishing house and the president of the Association of Bulgarian Textbook Publishers;
 - the president of the Association of Parents from the 23rd general comprehensive school in Sofia;
 - 23 students: ten from the 31st general education school and ten from the 23rd general comprehensive school in Sofia who currently are being taught under the new curriculum; also three students in higher education from the University of Sofia, the department of philosophy, who experienced the transition from the old curriculum to the new one.

b) From the category of *educators* there were interviewed three different groups:

- 10 university professors from the University of Sofia: the departments of Bulgarian language and literature in the faculty of Philosophy, the faculty of Sociology, the faculty of Slavic studies, the faculty of Journalism, the department of French language and literature in the faculty of Classical and Modern Philology. All of them are involved in the pre-service training of teachers;
- the head of the In-service Teachers' training Institute in Sofia involved in the in-service training of teachers; and
- 3 secondary education teachers from both comprehensive and elite profile schools: from the 9th French language gymnasium in Sofia, the 1st general comprehensive school in Sofia; and the 12th general comprehensive school in Sofia.
- 4 members of the Syndicate of Bulgarian Teachers in Sofia;

c) From *the category of the administrative staff*, there were selected to be interviewed those people who are involved in the educational system and have administrative functions and power of decision-making. To this respect there were interviewed the following representative stakeholders:

- 30 ministry officials responsible for curriculum policy, qualifications and assessment policy, textbook policy, inspection policy, in-service teachers' training policy, design and development of specific subject-curricular areas; the Deputy Minister on power at the time of our visit; and 2 former Deputy Ministers who contributed in the design and implementation of the curriculum reform (in total 32 informants);
- 2 school Directors and the deputy Director of the 31st and 23rd general comprehensive schools in Sofia; and the President of the School Board of the 23rd School in Sofia (in total 4 informants);
- the Director from the Bulgarian Industrial Association and the Chairperson of the Bulgarian Teachers' Union (in total 2 informants);
- Finally, there were interviewed the heads and 10 inspectors of the regional inspectorate in Sofia (in total 12 informants).

It was to be expected that these three different groups would have different opinions and approaches to the curriculum reform and this is why they have been selected. Of course, variations can also exist within the same group, but the important in our study is to examine both the point of views of the different stakeholders involved in the process of the curriculum reform and its implementation at different levels and stages, as well as the perspectives of the civil society.

10.4.2 Informants from questionnaires

The rating instrument described above (see chapter 10.3.2) was administered to 201 respondents across Bulgaria through the network of *Paideia* foundation. Among them, it was administered also to all those who were interviewed with the exception of the Deputy Minister for Education, the Head of General Education Policy Directorate, the representatives from the publishing house *Colibri* and those from the Association of the Bulgarian textbooks publishers and the Bulgarian industrial association.

In detail, the target group consisted of:

- 10 ministry officials from the Ministry of Education and Science, the Directorates of: General Education Policy; Teachers' Training; Textbook approval; Special Education Needs; Ethnic Minorities; Inter-institutional Council for the Curriculum;
- 5 experts from three NGOs responsible for supporting the modernization of the Bulgarian education system through research and pilot projects: the *Paideia* Foundation, the Open Society in Sofia, and the Foundation for children with special needs;
- 5 members of the Syndicate of Bulgarian Teachers in Sofia;
- 32 inspectors from 26 out of the 28 Regional Inspectorates on Education, which exist in Bulgaria (see chapter 10.1.3 and annex 19 for the names of the towns);
- 112 teachers from the 46 towns, which cover virtually the whole territory of Bulgaria and are representative of small, medium-sized, and large communities (see chapter 10.1.1 and annex 19 for the complete list of the cities);

- 13 university professors from the University of Sofia from the Departments of Bulgarian Language, Bulgarian literature, Sociology, Philosophy, Mathematics; French Philology; Slavic languages;
- 24 students from the same university from the Departments of Bulgarian Language, Bulgarian literature, Greek Philology, Philosophy, History and Geography.

The aim was to address representative actors involved in the curriculum reform process covering virtually the whole territory of Bulgaria including both rural and urban areas, developed and less developed regions, and municipalities of varied size.

The data gathered through the investigation tools, already mentioned above, allowed the characterization of the implementation of the curriculum reform and its impact on the teaching profession in a significant way, as well as its valorization in terms of efficacy. The following two chapters (chapter 11 and 12) are dedicated in the presentation and discussion of the findings.

CHAPTER 11. AMBITS AND ACTORS OF SECONDARY CURRICULUM REFORM IN BULGARIA

In the present chapter, we will analyze the implementation of the curriculum reform that took place in Bulgaria from 1989 onwards, exploring these elements that are interrelated with the reform, namely: the students' evaluation and assessment system, the textbook policy and the quality monitoring through the inspection system. These elements have been also the objectives of the first component of the "Education Modernization project" adopted in 2001 (World Bank, 2000a), through which the educational reform towards the modernization of the national system initiated in Bulgaria (see chapter 11.1).

The project had the overall aim to align the institutional, organizational and legal framework of the Bulgarian education system with the structural changes that had taken place since democratization in the national economy and labor market. It was structured in six main objectives targeting the whole system of general education, namely:

- a. creating conditions for improving the quality of teaching and learning in general education;
- b. creating conditions for improving overall resource management in general education;
- c. creating conditions for improving overall resource management in higher education;
- d. establishing a student loan program and restructuring the existing student stipend system;
- e. creating a competitive fund for improving teaching resource management in higher education; and
- f. strengthening MES capacity for project management and communication.

From the above mentioned components, the areas that comply with the objectives of our study and we will analyze later on, belong to the first one which has the ultimate goal to improve and perfect the quality of teaching and learning, by:

- developing new content of education at the national level and introducing national education standards and standards-based curriculum in general education;

- creating an external system for student assessment capable of providing reliable information on the quality of education by measuring students' achievements and organizing national matriculation exams at the end of general education; and finally by,
- developing and introducing an improved system for inspecting, monitoring and supporting schools in the process of implementing the new content of education.

We will use these planned outcomes as points of reference while analyzing the implementation of the secondary education curriculum reform. To better understand the effect that the curriculum reform had on the above mentioned areas and vice-versa, i.e. how changes in these areas affected the curriculum implementation, we will begin by examining the different actors involved and the way the reform was communicated to the public. Furthermore, we will examine the way the curriculum reform was implemented in the country and the accompanying reforms that took place to support the introduction of the new curriculum in the areas of students' assessment, textbook policy and inspection system (see annex 20 for the questions of the interviews).

Our analysis is based at whole on the views of 96 different stakeholders interviewed in person in Sofia, between 2003 and 2007 (see chapter 10.4.1 and annex 18 for the complete list of the interviewees). The informants comprise 50 administrators (including Ministry officials responsible for educational policy development, secondary school directors, unions' directors and inspectors from the regional inspectorate in Sofia), 18 educators (including teachers in secondary education schools, university professors and teachers' trainers) and the general public (including representatives from non-governmental organizations, parents associations, and students from secondary education and higher education).

11.1 ACTORS INVOLVED IN THE CURRICULUM REFORM

While designing and implementing an educational reform there is a need for the establishment of effective communication networks between teachers and politicians and indeed all those who have a say in the nature of educational provision. Observing reform strategies in European education systems, one could deduce that these are targeted on, or originated from one set of stakeholders, with limited recognition for the legitimate concerns of others. Such strategies have left few enduring effects, while the procedures for their evaluation have also proved to be largely ineffective. Feedback about how the reforms are being implemented is often cumbersome, and does not help to determine the shape that they should take on the long term (Benavot and Braslavsky, 2006). All these limitations and interactions suggest the need for systemic approaches to reform. There is often a gap between what is proposed and what is really done. Sometimes, there is a breakdown, including a failure to involve teachers early enough in the reform process, so they feel no sense of ownership and are unwilling to alter their classroom practice or adapt to modifications in school organization.

As democracies have become more pluralistic, the emerging emphasis on partnerships as a means of harnessing intellectual and fiscal support is one of the ways stabilizing a reform process (European Council, 2000). Undoubtedly, partnerships which share a vision of improved outcomes from education and improved productivity of schooling can strengthen the reform process by keeping a focus on the issues that really matter. Accordingly, policy-makers today should invest more time in fostering partnerships in order to avoid or reduce the potential disjunction between planning and implementation. This can succeed by involving those who will implement policies in the design phase by different means: representation in teams, piloting and field testing, consultation, etc.

To this end, it was considered important to explore who were the main actors involved in the design of secondary curriculum reform in Bulgaria and how this was communicated to the Bulgarian public. This may later help us to understand the potential challenges and obstacles faced in implementing the reform. We have asked the different target groups if they have been actively involved in the reform either by participating in working teams set

up by the ministry or by being consulted through other means. We have also asked them to specify the way through which they have been informed on the overall objectives of this reform and the reasoning behind it. The feedback received is presented in the following two sections.

11.1.1 Degree of collaboration among different actors

From the 68 interviews held with educators and administrators in concern, we were informed that changes initiated in the secondary education curriculum since 1989 and on, were centrally decided by the Ministry of Education and Science (MES).

The new curriculum framework adopted in 1999, which marked the beginning of the modernization of Bulgarian's educational system, was centrally designed by the MES with the collaboration of other actors concerned. The eight curriculum areas (see chapter 8.3) have been developed by eight working groups, one for each curriculum area, consisted mainly of teachers (representing the 50%), University professors, parents, and experts from the MES who had only coordination functions. These curriculum areas were identified based both on Bulgarian traditions and the modern European and global experience, with the purpose to increase coherence between the individual subjects, modernize and democratized the educational content and introduce a European dimension in the Bulgarian education.

As of 2001, the World Bank became an important actor of the educational reform in Bulgaria through the "Educational Modernization project". The Education Modernization project was financed by a World Bank loan signed between the Government of the Republic of Bulgaria and the World Bank on September 19, 2000. This was ratified by the National Assembly on December 12, 2000 and entered into force on January 10, 2001. The loan amounted to a total of 62 million US dollars having an implementation period of nine years, divided into three-year phases. The project was developed in a series of documents and annexes, the key of which are the Project Appraisal Document (PAD) of August 7, 2000 and the Education Modernization Project of 2001 (World Bank, 2000a).

The education modernization project was prepared by international experts and a MES management team including the Minister for Education and Science, the Deputy Minister for Higher education sector the Deputy Minister for General education sector and the Chief Secretary. From the beginning of the project until its termination, it was carried out by four different ministries.

The Project failed to achieve the pre-set requirements and objectives and was cancelled three years after its initiation. One of the reasons attributed to its failure, was the lack of communication among the different responsible actors and the lack of raising public awareness (ASIARP, 2004). This was a significant impediment to the smooth implementation of the reform, that we will examine through the voices of the different interviewees in the following sections.

11.1.2. Public information and communication on curriculum reform

As far as regards the communication of the curriculum reform to those actors concerned but not directly involved in the planning process and to the general public, it was unanimously stated by those teachers, parents, students, members of the teachers' union, and educational experts of NGOs interviewed (45 in total), the typically poor capacity of the MES to communicate and explain its policies well in advance to the teaching staff and the public in general. In our question: when and through which means have you been informed on the curriculum reform, the following answer given by a secondary education teacher is a common point of view for all target groups:

“We have been informed only through bureaucratic documents about the reforms and the new regulations, once everything was already decided” (teacher).

This lack of broad communication to the public was also admitted and justified by the former ministry officials who were acting during the design of the reform, from 1997 to 1999. The opinion of this group is well represented through the words of the former Deputy Minister for education acting during the above mentioned period:

“The Ministry had to face several challenges and difficulties since the beginning of the curriculum reform: resistance of the public who could not understand the philosophy of the new curriculum, attacks from professional unions of teachers, lack of sufficient financial resources and good human capacity, are only some examples. Further efforts to communicate and collaborate with teachers’ unions in order to review the education standards have failed. Under these circumstances, we did not manage to organize in extend a public debate and put in practice everything that were already designed” (former Deputy Minister for education).

According to the opinion of the two education experts of the NGOs we have visited, the decision-makers at the MES were expecting that the introduction of a general education minimum and the possibility to choose both compulsory elective and freely elective subjects would had been welcomed by those who work within the secondary education system. They were also expecting that these developments would have received a warm welcome among parents who insisted that secondary education should give children the possibility to pursue education that fits within their interests. Based on these assumptions however, according to the interviewees, the MES failed to effectively communicate these new developments to the general public, so as to achieve their general acceptance. This opinion was shared by all respondents who claimed that a public distrust was generated in the course of the preparation of the reform.

An illustrative example of the scarce information and support made available to educators is the big delay in providing them with professional guidance, training and information on the nature and purpose of the curriculum reform. The first training seminars offered to teachers took place only as late as the end of 2003, i.e. three years after the new curriculum had become effective (see chapter 12.2 on in-service teachers’ training).

Teachers, not having any decision making power but neither the opportunity for consultation during the design of the reform, were unfamiliar with the objectives of the new curriculum and the philosophy behind it. The seven school directors and teachers, as well as the ten inspectors interviewed admitted that those teachers facing big challenges in the

practical application of the new curriculum were not willing to participate in its successful implementation.

The lack of communicating the purpose and overall goal of the reforms, the intentions and the new measures adopted by the Ministry of Education and Science led to the low awareness of the public and the lack of mutual understanding among different actors concerned. As it was to be expected, this in its turn led to resistance against the implementation of new policies by the receivers of these reforms, i.e. by students and their parents. An illustrative example of the resistance generated in the social group is this of externalizing the school-leaving exam (matura). Due to this opposition, the establishment of a national matura exam was postponed and delayed significantly (see chapter 11.3.2 on students' assessment and evaluation).

The following statement articulated by the parent of a student in secondary education, is a characteristic example of the negative point of view and the confusion of the social group of our informants:

“We do not understand the purpose of all these reforms. Our children study in a continuous changing and unstable educational system; why should we have for instance a new external Matura examination?” (parent).

An important finding of our interviews with the acting ministry officials, is the fact that the new government on power, as of September 2004 when our interview took place, became aware of the importance the social dialogue has on the successful implementation of the planned reforms and therefore, attempts were made in order to enhance public debate. The Minister for education acting in that period said that they were publishing the new decisions more systematically on the MES web site and the official Gazette.

The efforts of the government in power as of September 2004 to enhance social dialogue were acknowledged by all the interviewed teachers and the head of the Syndicate of Bulgarian teachers in Sofia. However according to their opinion, these efforts have not been always well organized and therefore teachers still do not really have the opportunity to participate actively in the design of the reform. In our question what are the current activities that the MES organizes in

order to debate the reforms, the answer given by the head of the Syndicate of Bulgarian Teachers in Sofia is representative:

“The MES is conducting currently a public debate to discuss the secondary education strategy before its adoption, with teachers, inspectors and head of schools. However, when meetings are held with all of them in the same time, how can teachers feel free and express or impose their opinion to any of them?” (Head of Syndicate of Bulgarian Teachers in Sofia).

The above presented point of view of the different stakeholders and the civil society can give us an overall picture on the degree of their involvement and mental preparation towards the implementation of the secondary education reform. Given the low public awareness on the ultimate goal of the curriculum reform, one would expect important problems in its implementation. This hypothesis is based on the theory that it is simply impossible to win public trust in a reform in the course of its implementation, if justified public distrust has arisen in the course of its preparation. In the following sections, we will analyze the implementation process of the curriculum reform with the aim to identify both good practices and potential gaps.

11.2 SECONDARY EDUCATION CURRICULUM REFORM

Curriculum is a word that is never far from debated in education reforms. The school curriculum has typically been a powerful instrument intended to serve changing ideological ends: for example, reinforcing dominant societal values and cultural mores, supporting the growth of national economies, legitimating explicit political principles, fostering new scientific knowledge and technical applications and, more recently, developing the full potential of young learners and their integration into adult life. The school curriculum has reflected the impact of these changing ideological and philosophical bases by integrating, to various degrees, a multiplicity of societal, economic, political, educational and pedagogical viewpoints. While some are less evident and others are highly contested, ideological beliefs about the purposes of schooling and education leave an indelible mark on the design and implementation of the school curriculum.

In the case of Bulgaria, politicians in the beginning of 90s had to design changes in the school curriculum that should support and consolidate the beginning of the democratization of the Bulgarian society. Educators on the other hand, had to bring on board these changes in the daily practice. The views of the different informants presented below will help us to examine possible disjunctions between the intended formal and active curriculum. To do so, we focus on the following items:

- the timeframe of the curriculum implementation and possible delays;
- changes introduced in the learning content and the degree of its democratization;
- changes introduced in the school time table and the impact on the autonomy of schools;
- obstacles and resistance to the implementation.

11.2.1 Implementation of curriculum reform and possible delays

As we have already seen in chapter 8.3, changes in the educational content of secondary education began immediately after the change of the regime in the country. However systematic reforms under a new curriculum framework took place a decade later. The process of the curriculum reform implementation could be divided in two main phases:

- a) the period from 1991-98 where the “cleansing” of the learning content took place; and,
- b) the modernisation of the Bulgarian educational system which began in 1999 and is being continued until today.

Below, we present the main developments related to the secondary education curriculum reform during these periods.

a) the cleansing of the learning content: 1991-98

According to the opinion of the teachers, university professors and the NGO experts interviewed (19 in total), in the beginning of what proved to be a lengthy reform in secondary education, there was no clear understanding of the need to thoroughly reform, restructure or modernize the education system. The whole Bulgarian society was considering the national education as quite good. Therefore, as it could be expected, the only changes considered imperative from the state, involved eliminating some elements in the regulations and the curriculum which were stressing the benefits of the socialist against the capitalist society and were underlining the role of the Bulgarian communist party in the national development and governance. This thinking was precisely what motivated the changes that occurred in the years 1991–93 in the education content.

In the school year 1991/92, ideological elements related to the socialist political system were removed from the learning content. These changes did not affect all subjects equally, though almost all study programs from 1st to 12th grades were revised. While the structure of the curriculum remained the same, within less than six months, all study programs were “cleansed”

from all ideological topics related with the principles of socialist society governance and development. Beyond these changes, two new elements were also introduced in the study programs: the basic skills that students were expected to acquire for each subject and the key concepts expected to learn in the course of their studies⁷⁶.

According to 15/18 interviewees from the group of educators, these initiatives were the first example of poorly communicated reforms in education. The following statement made by professor from the University of Sofia represents this opinion:

“The first changes in the curriculum were introduced in the middle of the school year, at the beginning of 1992, with no information campaign and without training teachers on the significance of the newly introduced elements” (university professor).

According to the information collected from the curriculum experts working at the MES, in 1993, under the principle “everybody should study everything⁷⁷” a new curriculum for 1st to 8th grades was adopted. The new curriculum consisted entirely of compulsory subjects. An attempt to partially introduce compulsory elective subjects was made in the curricula for 9th to 11th grades (upper secondary education, students aged 14/15-18/19), although in the first two grades the relative share of these subjects was very small.

Once the above mentioned principle was endorsed within the curriculum, it became fundamental in the newly developed study programs and textbooks, which were crowded with content and increased in volume by 20-50%, compared to those in 1990. In the same time, teaching and learning methodology in the curriculum subjects was merely reduced to simple provision of information.

In our question regarding the quality of the curriculum applied in that period, the two experts of the NGOs, the seven teachers and the ten inspectors interviewed said that the link among individual study programs was very loose. Based on their point of view, the fact that the new

⁷⁶ Information collected through personal interview with secondary education teachers in November 2003 and September 2004, see annex 18 for the complete list of interviewees.

⁷⁷ This was the political slogan of the government acting at that time (Georgeoff, 1977).

learning content was developed by experts in the respective field, probably guaranteed that study programs were in line with the latest scientific achievements, but it did not ensure unity, coherence and possibilities for establishing interdisciplinary links. For instance, the same key concepts were repeated across all humanitarian subjects or were exactly the same within one subject throughout all education levels.

Moreover, according to the above-mentioned informants, the 1993 curriculum failed to provide a standard framework for general education. The framework was different for the different types of schools and this made mobility within the secondary education system difficult or even impossible. It did not ensure comparability of secondary education diplomas and created many problems with study plans and textbooks. This was also confirmed by all the university professors interviewed.

In 1997, under a democratic government, the MES in order to fight the overloaded curriculum gave to teachers the freedom to cut down 20% of the content. In our questions on the criteria used to reduce the content, the 18 educators and the two NGO experts claimed that there were no pre-defined criteria at central level and that it was up to the teachers to decide. The following answer is representative given by a teacher of secondary education who also shared the opinion of the NGO experts and educators interviewed:

“We were left alone to decide what should be cut down and as it was to be expected, this was not a proper measure with effective results”
(teacher).

According to five teachers' testimonies, a disconnection among the different subjects was created: some of them were well structured with clear objectives, such as *Social studies* and particularly *Philosophy* and *History*, while other remained conservative, such as *Bulgarian language* and *Mathematics*. The most modernized subjects were *Foreign languages*, mainly designed according to the “European portfolio”.

The last two years, 1997-98, before the adoption of the new curriculum framework, which marked the history of the Bulgarian education system by introducing several novelties applied for the first time in the national context, were characterized by all interviewees as a period of a

“generalized crisis”. In our question what was the main reasons and needs that imposed the curriculum reform launched in 1999, the different informants referred to the tension the multiple reforms in the education system generated in the society.

Parents and inspectors complained about the regulative chaos created in the national legislation for education that impeded its effective application. Teachers, school directors and NGOs for disadvantaged groups complained about the lack of financial resources to allow access for students to good quality of education. All informants unanimously agreed on the deteriorating quality of education which was reflected in the low level of students’ knowledge while entering the university. In continuation, the opinions and feelings of the informants are displayed by group of actors.

All teachers complained about the low salaries, the high risk they were running of loosing their jobs; the lack of their involvement in the adoption of the numerous bylaws and minor regulations, which were not even communicated to them in due time; and the lack of resources to address serious problems.

Parents were dissatisfied with the existing chaos in the regulations that governed the education system and they complained about the lack of clarity on the ultimate goal of the reforms. They blamed the government for the numerous administrative changes made in the period 1993–97, which led to an “unacceptable degree of entropy” in the regulatory framework of education. Moreover, parents complained about the regular changes of the education content and its dramatic increase in volume; as well as the increased volume and decreased quality and high price of textbooks.

The four school principles complained about the lack of funds to organize the teaching and learning process properly, also due to the economic and political crisis at the end of 1996 beginning of 1997; the old and poorly maintained school buildings and facilities; and the different administrative tasks they were expected to perform without being specifically trained for that.

The ten university professors complained about the poor results which high school graduates demonstrated at university entry exams and attributed this to low quality of the secondary education system.

Then ten inspectors and the Head of the regional inspectorate in Sofia complained about the ineffective and almost inexistent quality control mechanism for monitoring the quality of the education system. They referred to the inconsistencies in the different bylaws and regulations which created confusions on how to apply the overall regulatory framework.

One member of an NGOs for minority groups and disable children complained about the limited access to quality education for students from ethnic minorities and marginalized social groups; as well as the lack of qualified teachers, financial resources and appropriate textbooks for these students.

Four ministry officials acting at that period explained that under these turbulent circumstances, they realized for the first time the need to develop a comprehensive strategy for the modernization of the education system. This should ensure a coherent and all-encompassing regulatory framework, an adequate education content consistent with both individual and labor market needs, that should be designed according to national and regional developmental priorities.

b) Modernization of the education system: 1999-today

As a response to the generalized discontent with the way education was governed, the desire and the need to introduce the European dimension in education, achieving a balance among different subjects, a special law: the Level of Education, General Education Minimum and Curriculum Act was adopted in 1999 (MES, 1999g) introducing the new curriculum for all grades (see chapter 8.1.4 on legislative framework).

The new curriculum framework was based on the clear vision -at least for the experts in education that have been interviewed- that this is a document which reflects the strategy for

the development of the national education system. It was expected that the adoption of this document under a separate law would underline its significance and would help distinguish between fundamental problems of modern education and some less important issues.

Under this law, the MES adopted the Framework Requirements for Developing National Education Standards for the Content of Education (MES, 1999f), which set the criteria and the conditions that the proposed national education standards and the suggested curricula should meet. This document sets the following general requirements for developing national education standards depending on the subject in question:

- language proficiency;
- mathematical proficiency;
- ability to handle information;
- communication skills;
- critical thinking;
- learning strategies;
- integrity and interdisciplinarity of knowledge, skills, and attitudes.

The National Education Standards for the content of education in all subjects were introduced a year later with the Regulation No. 2 of May 5, 2000 (MES, 2000a).

The new curriculum was implemented in different time frames for the different education levels: primary, lower secondary and upper secondary education. New curricula and programmes of study have been adopted for the 1st and 2nd grades of the primary education in 2001 and 2002 respectively, and for all subjects in upper secondary education- grades 9 through 12- during 2000/02. However, the curricula for grades 3-7, although they have been elaborated and presented in due time to the MES, were implemented with delay. In 2004, a new curriculum for the 3rd grade was implemented and since then and every year is being introduced a new curriculum for the following grade (in 2005 for the 4th grade, in 2006 for the 5th grade, in 2007 for the 6th grade, in 2008 for the 7th grade). Until new curricula are introduced for the above mentioned grades, the old curricula are being used having extracted the ideological ideas. All newly adopted curricula and programmes of study have been published in the Azbuki newsletter (ASIARP, 2003b).

In our question which were the main contributions of the new curriculum to the improvement of teaching and learning methods, 3/7 teachers and 25/30 ministry officials interviewed, said that the introduction of compulsory elective subjects and free elective subjects increased student-centred learning. Also the consolidation of different subjects into curriculum areas helped identify and explore interdisciplinary links allowing students to develop and get to know their self, the society and the world more effectively (see chapter 8.3 for a detailed description of the curriculum and Annexes 2,3, 5 and 7: new curriculum for Bulgarian language, literature, Geography and French language for 9th grade). The new curriculum aimed to ensure that new concepts would not be introduced in one subject before they have appeared in another in the natural course of study, to limit the risk of overburdening textbooks with too much redundant information.

11.2.2 Changes in the learning content

As far as regards social studies, according to the university professors and teachers of *History* and *Geography*, important efforts have been made to make both subjects on one hand, less nationalistic and on the other hand, to provide social inclusion. According to the actors involved in this process, the first objective was achieved by reviewing the language in use of the respective textbooks and by excluding the image of the enemy that was dominating in the textbooks used during the communistic era. The second objective though -the promotion of social inclusion- proved to be a difficult task to carry out.

In our question to what extend the new curriculum and the revised learning content enhance social integrity, we received contradictory opinions between the ministry officials and the other actors concerned.

Even though the subject experts of the MES said that the current curriculum promotes social inclusion, all university professors, teachers and students said that none of the subjects are made to provide social integration. The following statement made by a professor in the faculty of Philosophy of the Sofia University pictures this opinion:

“It has been done a lot to neutralize this nationalistic content in History and Geography but they have not managed to develop a content that really promotes multicultural understanding, tolerance and social inclusion” (Professor in the Faculty of Philosophy, Sofia University).

In the sphere of humanities, secondary education teachers of *Bulgarian language and literature*, university professors from the faculty of humanities in the University of Sofia and ministry officials experts on the above mentioned subjects unanimously agreed that more changes have been made in the content of *Bulgarian literature* rather than this of *Bulgarian language*. This was to be expected since the ideological ideas of the communistic part were mainly transmitted through the former subject rather than the latter.

According to their testimonies, the curriculum of the *Bulgarian literature* was changed significantly both under the purpose of neutralizing its content as well as of introducing a critical and multicultural dimension. To this respect, all ideological and propagandist texts have been removed and a great variety of different interpretations were developed for the same literature text and author. Literature work of the most famous and representative authors and poets at international level also found a place within the teaching of *Bulgarian literature*. But what was even more innovative, is the inclusion of authors from the minority groups living in Bulgaria. This was an effort not only to raise the social status of the minorities but also to recognize their existence in the country and their contributions in the development of the Bulgarian literature. Finally, the content of this curriculum subject has been better elaborated to be closer to the interests and the age of the students.

The same respondents from the group of educators and decision-makers said that the content of the *Bulgarian language* has not witnessed significant changes, however the way it is being taught to pupils has changed. According to them, currently its teaching approach is more student-centered.

One respondent referred also to other examples of attempts made to neutralize the content of humanities from ideological beliefs, that have not been realized though due to lack of resources. Characteristic is the example given for the subject of *Philosophy* for the 11th grade. This has been revised to include elements that promote social inclusion. Six elective subjects have been created

for those students who would like to deepen more on the study of *Philosophy*. Among them one is called “Intercultural Philosophy” but it has never been published a textbook for this subject and therefore it has never be taught even though exists in the legal provision.

As an overall conclusion based on the feedback received in all the questions we addressed referring to the degree of democratization of the secondary education learning content, there was a general agreement on the need to promote democratic values through the school curriculum. All the respondents, independently of the group they belong to, with one way or the other mentioned the phrase “need for social inclusion” in their replies. They said that the most important achievement is that education specialists and the government have realized the need to promote democracy, equity, tolerance, mutual understanding and social inclusion through the learning content, and therefore, good intentions exist and the efforts have already begun by changing the overall objective of teaching these subjects. This opinion is supported by all interviewees and is well reflected in the following statement made by a university professor:

“Before the purpose of teaching subjects such as History and Geography was to intensify the conflict, now is more to understand the conflict” (Professor of History of Literature, Sofia University).

The feedback given on the second part of our question -the degree of alignment of the curriculum with the newly introduced national education standards which constituted an important step in the development of Bulgarian education, compared to the period before 1999- opinions varied both among actors who have a different role in the educational system but also within the same group of actors. A division of opinions was made between teachers and university professors who are specialized in different curriculum subjects; and particularly between those teaching more practical subjects, such as mathematics and natural sciences, and those teaching more theoretical, such as humanities and social studies. The former said that there was a great degree of compliance between their subjects and the educational standards while the latter mentioned frequent gaps between the standards described in the curriculum and the content of the textbooks which should reflect these standards.

It is worth mentioning the findings of a recent study conducted by the Paideia Foundation on the compliance of the study programs of *Civic education* with the National Education

Standards which come to verify the above mentioned opinion (source: <http://www.paideiafoundation.org/>). According to this research, the new design of the curriculum provides an adequate framework for meeting *Civic education* standards. Its format organized in general overview, goals and objectives, specific assessment methods, content and expected results provides a unified reference framework and serves as a standardizing tool. However inconsistencies have been identified between the standards mentioned in the curriculum and the content included in the textbooks. On one hand, there are specific *Civic education* standards that are mentioned in the study programmes without though being included in the content of the textbooks (see chapter 11.4.3 on textbooks). On the other hand, there is an overlap on the expected knowledge, competences and skills students should acquire. *Civic education* is an interdisciplinary area developed based on the integrated approach, i.e. it is included in the study programmes of all subjects comprising the curriculum area of “Social sciences, Civic education, and Religion”. However, the content for different subjects is not well coordinated and the same concepts and expected results appear in different subjects and grades throughout the educational system.

In our question to what extent the content of the different subjects is aligned with the European standards and enhances communicative and student-centered teaching approaches, three respondents mentioned the case of the foreign languages as the most representative example. Since democratization took place, within the curriculum area of humanities, *Foreign languages* have been the most modernized subjects in the Bulgarian Education system designed from the beginning according the European portfolio standards. The curriculum of *Foreign languages* is elaborated in such a way that the language acquisition focus on the development of the four basic skills (reading, writing, comprehension and expression) based on the communicative methodology of teaching.

Despite this general agreement on the well developed curricula of *Foreign languages*, 23 students both from language profile schools and comprehensive schools, two foreign languages teachers in secondary schools and two university professors specialized in the teaching of classical and modern languages who have been interviewed claimed that the grammar-translation method is still prevailing in Bulgarian secondary schools as a daily practice of teaching. They have attributed this in the lack of adequate materials and other resources to carry out the teaching

process in the desired manner. They referred to the lack of supportive materials such as television, recording machines, radio, computers, and some times even adequate books (this latter was mentioned in the case of Spanish language) to deliver effectively the lesson. This problem is greater in the case of the comprehensive schools, while educators from the foreign languages profile schools were quite satisfied with the supportive teaching material made available to them. The response given by a teacher of a comprehensive secondary school in Sofia endorses the opinion of the university professors, students and teachers from the same type of schools:

“The teacher is still left with board and chalk to run the language classes while the needs and demands of students have changed and their expectation as to what they can really do with and in the foreign language are not met to the full” (teacher).

In our question up to what extent the changes made in the learning content of secondary education have improved the education quality, the responses received were contradictory among different target groups. 6/10 university professors claimed that the quality of secondary education has been decreased significantly since the curriculum reform and this was reflected in the low knowledge level of secondary education postgraduate students entering to the university. They explicitly said that students have important knowledge gaps in specialized subjects, but what is even more worrying is the difficulties they face in oral and written expression in their native language. This opinion is illustrated in the statement of a university professor of the department of Journalism of the Sofia University:

“despite the fact that Bulgarian language and literature is compulsory throughout the whole education system, Bulgarian students are very weak in both oral and written expression in their native language. This is proved both in the university entrance exams as well as in the results of the external matriculation exam which took place as a pilot project in 2002” (University Professor of Journalism, Sofia University).

Criticisms have been expressed from the part of 4/7 teachers interviewed that the new content incorporated in the study programmes is rather redundant seeking to meet higher requirements, i.e. it is tailored to the best students rather than the average. They have also

witnessed that too much emphasis is placed on the theoretical knowledge at the expense of practical skills.

However, as we have already said, not all actors share the same opinion. The Head of Teachers' Union in Sofia and the Deputy Minister for Education acting in September 2004 believe that the quality of education has been improved during the last years. To support this opinion they both referred to the results of the internal and continuous evaluation of students in schools as well as to the results of the Bulgarian students in the international assessment of PISA. However, in reality this is not the case, the quality of education and relevance of skills taught are being decreased and participation rates particularly in upper secondary decline (World Bank, 2007a).

11.2.3 Changes in the time allocation of curriculum areas

The time factor while designing a curriculum reform can be easily overlooked. It is obvious that the curriculum can not go on accepting new concept processes without becoming overloaded, so if something new is added, something else must give way. The rebalance of the time allocation in different subjects may entail difficulties and often tension among the interested parties which should be settled with care. We have already seen that significant changes took place in the content of the new curriculum and the way it is organized. In this section, we will examine how school timetables have been adjusted to incorporate these changes.

While the requirements for the curriculum content are set in the Level of Education, General Education Minimum and Curriculum Act, guidelines for achieving the general education minimum and organizing class hour allocations within each school are specified in Regulation No 4 of September 2, 1999. The total number of class hours for each subject and for each grade is specified in the so-called "study plan" (MES, 1999b).

We have asked the different informants which were the main changes introduced in the time allocation of the different curriculum areas within the new curriculum framework and what was the impact of these changes on the autonomy of schools.

In 1999, with the introduction of the new study plans, in upper secondary education, the total hours for all subjects was reduced from 35 hours to 32 hours per week (see Annexes 8, 9 and 11 for the study plans for general education before the reform, afterwards and after recent revision). According to ministry officials, the Curriculum Act changed and consolidated the emphasis given to each curriculum area reflecting the new needs of the 21st century. It regulated the minimum and maximum of hours that teachers should work, as well as the minimum and maximum of school hours for students.

However, according to the four school directors and the two members of the NGOs interviewed, many changes in the time allocation affecting the balance among different subjects still occur, violating the Curriculum Act. For example, as of 2004/05, students in all grades have an additional hour of *Physical education*, even though there are not even enough teachers to teach.

In our question on the impact that the new curriculum had on the autonomy of schools and teachers, the opinions expressed varied. The 30 ministry officials referred to two novelties that according to their opinion increased the autonomy of schools and teachers and gave the opportunity to students to study and focus on their preferred subjects. First of all the new curriculum, structured in compulsory, compulsory elective and free elective subjects, is designed to give freedom to students to choose the subjects they would like to study in addition to the general education minimum. The first two types of subjects are studied within the compulsory class hours, while the first type ensures that the general education minimum will be met, the second type guarantees the freedom of choice.

Secondly, for the first time in Bulgarian history, under the new curriculum framework, each school can develop its own curriculum, the so called School Based Curriculum (SBC), to reflect its specific profile (see Annex 10, 12 and 13 for the time allocation on SBC and an example of a developed SBC by a secondary school). The SBC determines compulsory elective and free elective subjects and specifies class hour allocation for each subject.

However the positive opinion of the ministry official interviewed was not shared by all actors. 4/7 teachers said that in practice they don't have much freedom to propose the courses to be given because they are the school directors who decide according to the resources available. All four school directors complained about the lack of guidelines as well as financial and human support to develop at school level the proposed list of subjects given by the Ministry. All the 23 students interviewed said that the subjects they would like to learn are not included in the school programme and therefore the SBC does not really cover their real needs and interests. A student of upper secondary education gave the example of *Economics* that he would like to study but this was not included in the curriculum.

Furthermore, referring to the impact that the SBC had on the school time organization, two experts from the NGOs of Paidiea and Soros Foundations said that that the SBC increased the overload of the curriculum. As the free-elective subjects are not included in the study plans, often teachers encourage students to take every time more elective classes in order to cover their compulsory hours of teaching which obviously cause them an overload. This has been also confirmed by all the interviewed students. The opinion of these two groups is expressed through the words of an NGO expert who said:

“Debates that the Bulgarian curriculum is overloaded have existed since 1990 and one of the ideas of adopting the Curriculum Act of 1999, was to lighten the curriculum, however the SBC prevented this” (NGO expert).

Ministry officials and parents have a different perception towards the curriculum overload. They said that curriculum overload in the Bulgarian case is not so much associated with the hours students spend in the school daily, but with the extra-curriculum activities and particularly the private classes in the evening. They said that this is mainly due to the low quality of the Bulgarian education system, as students have to repeat the same classes in the afternoon in order to understand and be prepared for the next day. Therefore, according to these informants, the curriculum overload could be resolved naturally if the quality of the education system was better.

In our questions which are the preferred courses usually proposed or taken by students within the context of the SBC, all school directors, teachers and students themselves said that they demand for extra hours on the core subjects, mainly in the upper secondary education. Since students will be assessed on these subjects for the school-leaving exam or the university entrance exam, they want to be better prepared. Inspectors said that in the Bulgarian educational system of secondary education the teaching to the test approach is applied to a great extent. This was also confirmed by all 18 educators who pointed out the example of the 7th grade where students are being prepared extensively for the profile schools.

If we take the above mentioned points of view as reference for the degree to which the new curriculum helped to balance the school time organization and to involve schools to design a curriculum that meets their needs, the opinions vary to a great extent. It is obvious that the SBC is an important tool to increase autonomy to schools and meet the needs of students, but its practical application requires means often not available at school level. However good practice of SBC does exist in Bulgarian schools even though not in the desired extent.

From the timeframe of the curriculum reform implementation and the changes made both in the content and the time allocation within the new school curriculum, it was made evident that in the first case delays were observed, while in the second, the practice was different from the theory. In continuation, we will present the obstacles confronted during the implementation phase of the curriculum which could contextualize, if not justify, the gap between what was initially thought and what was finally done.

11.2.4 Obstacles and resistance to new curriculum

We have asked all 96 informants which were according to their opinion the main obstacles and challenges faced that impeded, difficulty or delayed the implementation of the curriculum reform. Based on the feedback received, the main obstacles could be grouped in five main factors:

- a) lack of institutional capacity and memory;
- b) lack and inadequate allocation of funds;
- c) gaps in the legal system;
- d) lack of a clear vision and a coherent education strategy;
- e) lack of an effective quality monitoring system.

In continuation, these factors are being presented and supported by the opinions of the different target groups.

a) lack of institutional capacity and memory

The independent evaluation of the Education Modernization Project, financed with a World Bank loan, showed that the MES does not have enough institutional capacity to formulate a clear education reform strategy, develop mechanisms for its implementation, and persistently pursue and manage all stages, measures and actions necessary to complete the reform. The different strategies for the development of education in Bulgaria, which were submitted in the expert group for discussion, demonstrated that there is no vision on the main principles of the reform, as well as on how should the reformed education system look like (ASIARP, 2002).

In order to ensure the successful implementation and monitoring of new education standards, curricula, and programs, the Education Modernization Project (EMP) envisaged the establishment, at a very early stage, of a new body to be called Curriculum Council (CC).

The Curriculum Council should be a consultative body to the MES, consisting of distinguished experts in the field of education. According to the deadlines set in the World Bank Memo of December 2002, the CC should have been created by January 31, 2003 (ASIARP, 2003a). The CC was actually established on April 4, 2003 with a written order issued by the Minister for Education, which defines its tasks as follows:

“to consult the Minister on curriculum development, the elaboration, implementation and improvement of National Education Standards for the content of education and of study programs in general education subjects, as well as on the elaboration, implementation and improvement of National Education Standards for the assessment system” (ASIARP, 2003a).

This suggests that the responsibilities of the newly established body should be to supervise the introduction of new education standards, curricula and programs, to monitor their implementation and to consult the Minister on these matters.

According to the order, the CC consists of 15 members. The Council is chaired by the Deputy Minister for general education and comprises experts from the MES, the heads of the five directorates working on general education and representatives of teachers, school directors, higher educational institutions and NGOs. According to the interviewees, its creation is a huge achievement given the considerable delays that existed until recently. Some concerns however exist, since it is unclear what principles have been pursued in the selection of the CCs members, which runs contrary to the requirement for this body to be socially representative and legitimate in the public eyes (ASIARP, 2003b).

According to the respondents from the group of educators and the social group (46 in total), the governance of the education system remains highly centralized despite the various attempts of decentralization and creation of independent bodies. Furthermore, the various institutions (governmental and nongovernmental) do not achieve an appropriate level of collaboration and coordination, which inevitably “decreases effectiveness and leads to chaos”.

Current and former ministry officials discussing the problems encountered for implanting the curriculum reform, referred also to the implications derived due to the lack of institutional memory within the MES. It is representative what the Deputy Minister for Education acting in September 2004 said:

“There is no continuation, appointed people change very often, and the experience of the former members to the new is not being communicated”
(Deputy Minister for Education).

Indeed, the Bulgarian education system experienced many government and ministerial changes in a short period of time: since the democratization in 1989 and as of September 2004, the government has changed 11 times.

b) lack and inadequate allocation of funds

Quality and efficiency of the teaching and learning process are not among the criteria for financing schools in Bulgaria (ASIARP, 2003a). Schools are financed based on standards that determine the minimum number of students per class, the number of teaching and other staff in municipal and state-funded schools, and the average salary for those working in the education system. Once the total budget allocation for education is approved within the overall government budget, the Ministry of Education and Science allocates funds for capital investment, scientific research on education and in-service training for teachers and school directors. According to the opinion of the school directors and ministry officials interviewed, the existing system (as of September 2004) produces much inequality in the amount of funding allocated to individual schools, and hence leads to unequal access to quality education. This was also agreed with by the ministry officials and the inspectors interviewed who explicitly said:

“Although it is obvious for everyone that education resources are not allocated cost-efficiently to meet education modernization needs and there is an excess of teachers in Bulgarian schools, there is still the strong pressure

for preserving teaching positions, which comes mainly from trade unions and the teachers' community” (Ministry official).

The “per capita” finance formula designed under the EMP since 2001 (ASIARP, 2002) was adopted as late as January 2007. According to this formula, schools will be financed according to the number of students. This has the ultimate objective to optimize the school network given that today in Bulgaria there are at schools half of the students that used to be ten years ago (see chapter 6.2.1).

All teachers, school directors and parents interviewed complained about the insufficient provision of school textbooks. They explained that since 1999, for a variety of economic and political reasons, the State no longer provides free textbooks to students except to first-graders. According to their opinion, this not only affects the access to education, but also drastically limits chances to ensure high quality education. It is representative what said a teacher from a comprehensive school in Sofia:

“Socially disadvantaged parents cannot afford to buy textbooks and this limits the chances of their children to have equal access to education with kids coming from more well-to-do families” (Teacher).

The new measure of not providing any more free textbooks to all the grades of education has not been accompanied by complementary provisions for schools to buy textbooks for needy children. This was also admitted by the ministry officials responsible for the selection of textbooks. As a result, textbooks are not enough especially in small towns and isolated areas. Decisions have left to the good will of Publishing Houses if they want to offer some extra books for free (see chapter 11.4 on textbook provision).

c) gaps in the legal system

All informants agreed that the legislative framework which regulates the education in Bulgaria is very complex and often contradictory without providing a clear political philosophy and answer to the question what should be regulated at the central level, what should be regulated locally and what should not be regulated at all. According to them, the multitude of bylaws and minor regulations, which are issued one after another, often without being coordinated with other acts, creates regulatory chaos, which has proven to be counterproductive. This opinion expressed unanimously by all respondents is illustrated through the answer given by an expert from the Paideia foundation in Sofia who stated:

“The problem is that the regulatory framework of education is largely based on secondary legislation, and the provisions regulating the education system often contradict each other. Secondary education for example, is governed by 3 laws: the National Education Act, the Level of Education, General Education Minimum and Curriculum Act and the Vocational Education and Vocational Training Act; by at least 3 ministerial decrees; 9 regulations; 17 ordinances; 5 instructions; and 8 guidelines of which only the Guidelines for Organizing Teaching and Learning Activities in General Education Schools, Special Schools and Vocational Schools for school year 1999/2000 amount to a total of 394 pages!” (NGO expert)

Interesting is the fact that policy-makers who are the creators of the legislation, admit this problem. This is reflected in the words of the Minister for Education who stated:

“One of the problems in secondary education is the large number of laws and bylaws, which in some cases are not harmonized with each other. This is a major obstacle to the effective operation of the secondary education system (Minister for Education).

Apart from the confusion created due to the complicated legislative framework, informants also referred to the discrimination that this causes. Policy-makers on minority issues complained about gaps in the legal system which allow the existence of schools where only

children from minority groups can study. According to them, the existing legislation provides conditions for the segregation of these groups while there is growing emphasis on early selection into specialized and selective, even elitist, education. They gave the example of the illegal examination after the completion of the 7th grade which favours this situation (see chapter 11.3.2 on students assessment). According to their opinion, this lead to a fragmented and complex secondary school system which promotes selection rather than education for all; a system which favours the high-achieving students, but seems less concerned about retaining and motivating average and slow learners.

The discrimination created within the education system due to legislative discrepancies are not only limited to specific disadvantage groups but to all students concerned. This was also highlighted by the Minister for Education, Dr. Igor Damianov, who during the Seminar “Reform in Secondary Education in the Republic of Bulgaria” organized jointly by the MES and the World Bank in 2005 in Sofia, explained that:

“Serious difficulties arise from the fact that students in basic education schools complete basic education level and receive their certificates at the end of 7th grade, while students in profile-oriented and vocational schools with admission after 7th grade receive such certificates at the end of 9th grade. This creates an impression of inequality among children from the same age group” (Minister for Education⁷⁸).

According to all 30 ministry officials, the Head of in-service teachers training in Sofia and the two NGO experts, the adoption of the Level of Education, General Education Minimum and Curriculum Act (MES, 1999g) was an important step towards the actual implementation of those regulations of the 1991 National Education Act referred to the development of National Education Standards (MES, 1991), however, the new Act did not provide a comprehensive solution to the practical implementation of the curriculum reform. This was mainly because mechanisms for teacher training and the development of textbooks and

⁷⁸ Minister for Education, Dr. Igor Damianov, in his speech under the topic: “The challenges to secondary education in the Republic of Bulgaria” during the Seminar “Reform in Secondary Education in the Republic of Bulgaria” organized by the MES and the World Bank in January 31, 2005 in Sofia, Bulgaria.

teaching materials were not included in the regulation so as to support the educational reform in Bulgaria.

d) lack of a clear vision and education strategy

The majority of the experts from the NGOs, inspectors, parents, school directors and teachers interviewed pointed out the importance of the development of a comprehensive education strategy at national level. The informants said that between 2001-04, numerous strategies which have a direct or indirect impact on education have been developed. These include: Strategy for the Development of Secondary Education in Bulgaria, Strategy for Integration of Children from the Minorities, Strategy for Integration of Children with Special Education Needs, Strategy for Introduction of ICT in Bulgarians Schools, Strategy for Health Education, to name just a few.

However, it is important to point out that clear political vision should go hand in hand with the willingness of the other actors in the educational system to bring on board the reform. At the end of 1990, over 90% of all teachers were still members of the Bulgarian Socialist (formerly Communist) Party. This was the reason actually that the Law on Public Education prohibited teachers from becoming members of political parties for a period of three years, beginning in 1991. Because the Zhivkov regime had tinkered often with Bulgaria's educational system, longtime teachers had opposed toward reform of any type. This attitude hampered the removal of the old socialist structures from the educational system, concerted the depolitization to a slow process and still impedes the implementation of innovative measures.

e) lack of quality monitoring system

According to the experts working in the two NGOs visited and the ten inspectors from the inspectorate of Sofia, despite the stated intentions of the MES to persistently collect and analyze feedback from the education system on the actual implementation of the curriculum, in the five years that have elapsed since its introduction (as of September 2004), no such information was ever collected. A project financed by the Open Society Foundation: “Monitoring and Evaluation of the Education Modernization Project” conducted four reports from 2002 to 2004 on the progress made on the planned activities (ASIARP, 2002, 2003a, 2003b and 2004).

All the inspectors interviewed complained about the ineffective system of inspection, the lack of human resources and the alignment of policy decisions with inspection findings (see in chapter 11.5 on quality monitoring through inspection).

The lack of analysis on the way the new reforms are actually being applied in practice, impedes the timely intervention and improvement of the overall process and practice.

11.3 STUDENTS' EVALUATION AND ASSESSMENT SYSTEM

Curriculum reform also demands the alignment of assessment systems. Assessment practices can exert powerful influence on teaching, on the implemented curriculum and on schools ethos and organization. There is an inevitable tendency to devalue any learning aims which are difficult to assess by the means currently acceptable; examples are practical work, open-ended projects which cannot be attempted in the short time possible for formal tests, and measures of motivation and of students' values. This distorting effect might be obvious when curricula are being formulated, or at the implementation stage if assessment practices interact with trends in curriculum change. Trends in assessment practices interact with changes in curriculum change and this means that assessment policies should not be seen in isolation from policies for curriculum reform. As innovations develop, it is explored how assumptions or actions about assessment practice are shaping the development or are being shaped by its impact.

While there are observable trends and comparable developments in assessment across many OECD countries, there is some diversity as cultural differences and other educational developments in those countries are reflected in the approaches adopted (Benavot and Braslavsky, 2006). One notable example of diversity is that whilst some countries regard external assessments as an essential feature of their education system, others (including some with a reputation for high quality in education) have resisted moves towards more external assessment. Countries are now seeking ways of ensuring that external assessments do not narrow or ossify learning developments, while continuing to provide valid evidence about effectiveness of schools for accountability purposes. In the context of mass higher education and lifelong learning, countries are looking for a means of developing competences based assessment systems which involve a shift from learning inputs (duration, structure, institution) to learning outcomes (competences, skills and knowledge).

As it is well known, students' assessment has an essential place in every national education system. Recognizing that traditional methods are inadequate to reflect and reinforce curricular changes and the efforts of schools to achieve new aims, the Bulgarian government had planned a reform on the assessment practice through the Education Modernization

Project funded by the World Bank (World Bank, 2000a). The creation of an external unified national system was planned for evaluating students' performance. This, on one hand would help overcome localism and subjectivism in assessing students' achievements and on the other, it would provide reliable information on the quality of education by measuring these achievements.

According to the planned reform, the new assessment system should be designed as a series of national tests at the end of 4th, 8th, and 12th grades, which would guarantee the transition to the next level of education (ASIARP, 2002). Meanwhile, the national tests should also guarantee access to schools of prestige ensuring social justice on a national scale. They would also help discontinue the vicious practice of taking "private" lessons to prepare for elite schools and universities – a practice that introduces drastic forms of social injustice and corruption.

Bearing this in mind, we have collected the opinions of the different informants concerned, on the degree to which the planned reforms have been carried out and the potential obstacles may be confronted. The following two sections present the findings of our interviews.

11.3.1 Implementation of students' assessment reform and possible delays

The assessment reform in Bulgaria is one of the most widely commented in the public environment because it directly affects 60 000 graduating students and their parents (ASIARP, July 2003a). To support the implementation of the planned reforms in the field of students' assessment, the Education Modernization project envisaged the establishment of a National Assessment Unit (NAU), which should develop, pilot and implement the new national assessment system (World Bank, 2000a).

The first national school-leaving matriculation exam organized externally was planned to take place for the class of 2003. According to the members of NAU, the system for evaluating matriculation exams was approved in 2002; pilot national exams were organized

on May 8 and 11, 2002 and the results were analyzed; finally, the approved programmes for the matriculation exams after 12th grade in all subjects were posted on the Ministry's website in due time.

However, after resistance and opposition from students and their parents, the planned national compulsory matriculation exam did not take place in 2003. The same happened in 2004, and the Matriculation exam to take place as an external assessment has been unsuccessfully postponed for 2006 and according to the latest amendment, for 2010.

Since 2003/04, the external Matriculation exam functions on a voluntary basis for those students who are interested in participating. In the voluntary matriculation exam of 2003, 504 students participated (ASIARP, 2003a), while one year later this number was reduced to 38 participants from the whole country.

A new institution, the Centre for Control and Assessment of the Quality in Education, (CKOKO) was established in July 2005 replacing the NAU which ended its operations few months earlier (World Bank, 2007a). The new centre became responsible for the preparation of the national tests after the 4th, 8th and 12th grades. Among its responsibilities are also to monitor the quality in higher education through projects such as the "Eurostudents", as well as to monitor the international assessment tests. They are also responsible to train inspectors who will be in charge of analyzing the results of the national tests targeted to improve the quality of schools⁷⁹.

The Ministry of Education approved a three-year plan for the CKOKO, including a detailed sequence of the tasks to be implemented during that period. New technical staff has been hired for that national agency, including experts in psychometrics and item analysis, and targeted trainings have taken place. Significant progress has been made in data gathering and testing. In December of 2007, the results of PISA 2006 will be available and few months later, data from TIMSS 2007 will also be made public (World Bank, 2007a).

⁷⁹ Information collected through personal interview with a chief expert of the Centre for Control and Assessment of the Quality in Education, in February 2007 in Bucharest.

The census-based 4th grade national assessment was administered in all primary schools in Bulgaria in May 2007, marking a historical milestone as it is the first national assessment of student achievement. Students were assessed in Mathematics, Bulgarian language and literature and two interdisciplinary areas: humanities and natural sciences.

In June 2007, the new 7th Grade examination to be introduced in 2008, piloted the previous year, was administered. For this exam, students were assessed in Bulgarian and Mathematics.

The pilot Matura examination was carried out in April of 2007 with a sample of 3 700 students from 45 secondary schools (World Bank, 2007a). Taking into account that the introduction of the Matura has been highly controversial for over a decade and, as a result, continuously delayed, the fact that all stakeholders are now supporting the new examination bodies well for the successful implementation of the Matura in Bulgaria by 2010. Introducing the Matura examination is the key reform measure suggested by a recent World Bank Report as the means to overhaul current policies on access to tertiary education in Bulgaria (World Bank, 2007b). In addition, a compulsory Matura, administered centrally, is seen by many as one of the main tools to reduce the gray market of private tutoring before entrance into higher education. Universities also recognize that the complexity and expense of organizing their own entrance exams limits their ability to diversify their course and program offers and places an unnecessary burden on their administration and academic staff (potentially affecting, among others, research productivity).

Despite all the progress made, issues still remain concerning the future use of the Matura scores for admission in some specialized institutions and fields of study.

The national tests at the 4th and 7th grades will be compulsory for all students but they will only function as mechanisms to monitor the quality of the educational system based on the measurement of skills acquired rather than knowledge. The exam after the completion of the 7th grade will function as an entry exam only for those who desire to enter to profile schools.

From what we have discussed in this chapter, one can deduce that recently the Government of Bulgaria has worked intensively on both improving the capabilities of the Ministry of

Education to monitor the quality of education and collecting new information to be used in that endeavor. However, significant delays have occurred in the implementation of the assessment reform and its alignment with the ultimate objectives of the educational reform for the modernization of the Bulgarian educational system which began in 1999. One is wondering what were the obstacles encountered which caused these delays. This is exactly what we will examine in the following sections.

11.3.2 Obstacles and resistance to new students' assessment system

In order to understand what were the reasons that delayed the implementation of the assessment reform in Bulgaria, we asked the different informants to report on the main obstacles that they faced at the time of implementing the planned reform in the area of students' assessment. Based on the responses received by the 96 interviewees including students, teachers, school directors, inspectors, education experts, university professors and ministry officials, we can group these barriers in three main factors:

- a) inconsistencies in the regulatory framework;
- b) lack of good communication and understanding in the ultimate goal of the planned reforms and divergence in the interests of the different groups;
- c) inadequate format of the exam.

Below, we present each of the above mentioned factors raising the voices of the different informants.

a) inconsistencies in the regulatory framework

The compulsory and external matriculation exams for class 2003 were revoked by the Supreme Administrative Court precisely because of discrepancies in the regulatory framework. Informants from the group of educators and the social group (46 in total) gave two examples of these inconsistencies and violations to the legislative framework. First, the class of 2003 began studying in upper secondary education with the old curricula and programs and graduated with the new ones violating the National Education Act which states that no changes are allowed to take place for students who already entered an education level (MES, 1991). Second, the National Education Act stipulates that secondary education diploma is issued after compulsory matriculation exams but this provision is not being implemented in practice and there are not clear indications if it will be implemented in the near future since its implementation has been postponed several times up to now. This brings us to a quite interesting situation: the Act was passed in 1991 and sixteen years later, parents and students still find enough arguments to claim that matriculation exams are “illegal”.

Apart from the regulatory inconsistencies in the case of the school-leaving exam, the interviewees referred also to the optional examination given after the completion of the 7th grade for those students who would like to continue to profile schools. According to teachers, university professors, inspectors and ministry officials interviewed (see annex 18 on the complete list of interviewees), this examination is illegal. It has been introduced 35 years ago and still exists without any legal framework. It is representative what an inspector said:

“There are some orders of the inspectorates only about what date the exam should take place, how the assessment will be carried out but there is no law” (Inspector).

The former Director of General education Policy Directorate in MES explained that some attempts to justify the existence of this exam have been made during the past years. The first proposal was to reduce the compulsory education to 7 years, so as the end of the 7th grade would mark the end of compulsory education and the exam would function both as an exit exam and

entry for profile schools. Another proposal was to introduce even earlier specialization, as from the grade five, so the system would have different orientations in a very early stage and one of this would be after the 7th grade as well.

b) divergence in the interests of the different groups

The majority of the respondents (85%) mentioned that the lack of a common point of view and a general agreement on the role and function that students' assessment should have constituted a great impediment for the implementation of assessment reforms and particularly the planned reform of the school-leaving exam.

In our question of what should be the function of the matriculation exam, whether it should be "a general education exit exam" or a "university entry exam" different opinions were received. All the teachers, NGO experts and inspectors interviewed said that the Matricula should rather serve as a school-leaving exam because universities are not willing to accept matriculation exam results as valid for entry into higher education. However, 10/10 of the university professors interviewed stated that they would welcome Matriculation exam as a university entrance exam after some years of practice and when it proves to be an accurate and efficient examination. A representative example is what a professor of Bulgarian literature in the University of Sofia said:

"How is the matriculation exam organized and administered? How is the format of the exam? How can this exam respond to the different needs of different students: for those who are interested only in completing their education and for those who want to continue to different departments of the higher education? All these are issues to be resolved if it is for professors to accept this exam as an entry exam to the Universities" (Professor of Bulgarian literature, University of Sofia).

The need to ensure a high quality and effectiveness of the Matricula exam so as to be accepted as an entry exam to Bulgarian universities was also highlighted by the head of National Assessment Unit in Sofia who stated:

“If Matriculation exam proves to be effective, it will become one day a university entrance exam by a natural process. So, no pressure needs to be put” (Head of NAU).

Two NGO experts working in the Paidiea and Soros Foundations and the head and two experts who were working in the National Assessment Unit support the introduction of two-tier matriculation exams. The first tier would be required for high school graduation and the second would qualify for entrance in university. Those who want matriculation exams to serve as university entry exams argue that the current university application procedure is too expensive for students from provincial areas. The dual function of a Matricula as school-leaving exam and university entry exam would reduce these costs.

Another important finding of the interviews is the fact that while the opinions differ on the function this exam should have, the groups of policy-makers and educators agree and understand the importance and necessity of an external assessment system. They believe that this is necessary because it will ensure objectivity and will guarantee comparability between the achievements (marks) of students from different schools and different towns (the opposition provincial areas/capital, village/town). It is representative the statement made by the principal decision-maker, the Minister for Education acting in September 2004:

“It is essential to speed up and complete the development of a comprehensive assessment system, because the lack of an effective and standardized system for external assessment deprives the education system of reliable and objective indicators for quality and efficiency” (Minister for Education)⁸⁰.

⁸⁰ This need was highlighted by the Minister for Education, Dr. Igor Damianov, in his speech under the topic: “The challenges to secondary education in the Republic of Bulgaria” during the Seminar “Reform in Secondary Education in the Republic of Bulgaria” organized by the MES and the World Bank in January 31, 2005 in Sofia, Bulgaria.

However this opinion is not well accepted by the parents and students who do not understand the ultimate purpose of organizing externally this exam. It is representative in this respect the statement of a parent:

“There is not enough clarity and understanding as to what the external assessment system includes, what its goals are and what results it is expected to achieve” (parent).

Despite the opinions on the role of the externally organized school-leaving exam and its importance vary among informants, all of them agreed in the subjects that should be included in this exam.

In our question which subject you think should be included in the Matricula exam, all three groups of respondents -educators, policy-makers and the social group- supported the introduction of compulsory matriculation exams in *Bulgarian language and literature*, while for the other subjects, matriculation exams should be a matter of choice. This, according to their opinion, would guarantee the necessary level of language proficiency and skills. The first compulsory subject of the Matriculation exam is *Bulgarian Language and Literature* and the second compulsory is on the choice of the students and can be any of those subjects studied during secondary education. There is a third subject which is entirely optional and voluntary, and it is up to the students to decide whether they want to sit for a third exam or not.

It is also interesting that while educators and administrators are in favor of the development of a national assessment system, most of them recognize the need for a national Matricula exam but they are opposite to the introduction of national tests after the 4th and the 8th grades. They believe that this could create additional burden and stress to children and would lead to a merely learning to the test approach. This was also felt by parents and students themselves.

Questions and concerns presented in this chapter indicate that there has not been a proper communication between the institutions and the parents' community, but also within the institutions themselves. Policy-makers intend to implement a radical change to the school

assessment system, but no active public campaign took place to help parents and students to understand and accept the new form of assessment, so that the questions and concerns could be minimized.

c) inadequate organization and format of the exam

The opinions of the 96 different informants interviewed about the organization of the pilot matriculation exam administered by the MES in 2002 are unanimously negative. Even those who said that this was a timely initiative believe that it was not organized and held properly and underlined that the overall organization and the format of this exam should be improved.

Teachers and school directors were wondering why the results of the pilot matriculation exam have not been analyzed yet as of September 2004, and if they have, why there have not been communicated to them immediately. They suspected that the results have been “*hidden by the MES for some time*” because they revealed a low quality of education without having the criteria to estimate whether this reflected the actual situation or is due to the specific technology used for the analysis of the results. According to the Head of the National Assessment Unit, the results of the pilot Matriculation Exam on *Bulgarian language and Literature* have been analyzed and submitted to MES in September 2004, i.e. after two years of its execution. There have been communicated to teachers during the National Conference of experts on Bulgarian language and literature which takes place every year. The results indeed revealed very unpleasant results: “*40% of the Bulgarian students proved to be illiterate in their own mother tongue*”.

The educators and informants from the social group -parents, students and NGOs- believe that despite the fact matriculation was organized externally, it was not objective due to its inadequate format and lack of clear assessment criteria and rules. The great variety of profiles among which secondary school students can choose from, turned out to be a serious obstacle to the effective implementation of the general education minimum and its assessment. 17 or 18 different profiles are currently offered in schools across Bulgaria and there is still confusion on the principles applied when calculating the grade point average specified in school certificates and diplomas (ASIARP, 2003a).

Practicing educators think that the new assessment system would be really effective and useful only if national assessment standards are adopted:

“Only under this condition, the external assessment can have a positive impact on the quality of education” (teacher).

The priority of the National Assessment Unit (NAU) as of September 2004 was to change completely the format of the Matricula exam and transform it to multiple choice tests in order to increase its objectivity and enhance critical thinking. This priority was endorsed in the explanations given by the head of NAU:

“Currently the assessment of Bulgarian language and literature is based on the interpretation of a literature work. However, “interpretation” here does not have a real meaning as it consists in learning by heart different interpretations of the same literature work and reproduce them in the time of the exam. We have to find a way to ensure the exams enhance critical thinking” (Head of National Assessment Unit).

However, while the Head and experts of the new National Assessment Unit believe that this is quite easy to be achieved with most of the subjects, it is very challenging for *Mathematics* and *Bulgarian language and literature*.

“Standardized test for Mathematics for instance could result to be very unfair for students as they are expected to resolve the mathematical problem only with the one standard way. Anything else would not be recognized as a correct solution. We are trying to do our best to develop tests with questions targeted to measure the critical thinking of the students” (Head of National Assessment Unit).

Apart from ensuring objectivity, the urgent need to change the format of the exam derives from the increased number of graduates according to the estimations made in 2004: in 2006, 70 000 to 75 000 students were expected to graduate.

“With the current format, more than 1 500 evaluators will be needed only for Bulgarian language and literature and as the evaluators have to work

independently, we don't even have enough space to accommodate them" (Head of National Assessment Unit).

While the plans of the NAU back in 2004 were to introduce a combined traversal test consisting of: *Bulgarian language and literature, Mathematics, Social Sciences (History, Geography) and Natural sciences (Physics, Chemistry and Biology)*, finally the format of the pilot Matricula exam will assess *Bulgarian language* and a choice of one or two subjects from *Mathematics, Biology, Physics, Chemistry, History and Geography*.

Bulgarian language and literature will be again assessed through an essay but combined with multiple choice questions. This latter will be the method with which the other subjects will be assessed too. They decided to not include in the Matricula exam subjects that have another official and valuable examination, such as *Foreign language* and particularly *English*.

11.4 TEXTBOOK POLICY

Textbooks are a key tool for introducing and reinforcing national core curricula and unified national standards and assessment. They continue to be the predominant learning resource in most OECD countries, despite the advent of instructional technology and substantial resources devoted to the provision of computers in schools. In Bulgaria, textbooks constituted an important part of the curriculum renewal policy.

In the following sections we will examine the implementation process of the textbook policy, we will discuss challenges and obstacles encountered and we will present the opinion of the different informants on the impact these reforms had on the quality of textbooks.

11.4.1 Implementation of textbook reform and possible delays

Right after the fall of the totalitarian regime, the revised study programs were taught with the previously existing textbooks. By the 1990/91 school year, new textbooks had been introduced in some subjects, but many of them were not completely free of socialist rhetoric. A first-grade mathematics textbook published in 1990 contained the following exercise: "Count how many words there are in this sentence: *"I am grateful to the Party, for it leads my country to beautiful, radiant life and vigilantly protects us from war"*". A newly published music book contained songs about the party, a communist youth organization, and Lenin. Many teachers likewise continued to espouse the communist rhetoric in which their profession had been firmly indoctrinated.

Existing textbooks for *History* turned out to be totally obsolete due to their heavy ideological content and the then Minister for Education, Nickolay Vassilev, prohibited them in the second semester of the school year 1991/92, without however suggesting any substitutes. Within inconceivably short deadlines (March–May 1992), some kind of surrogate textbooks, called "Notes in History" with no illustration and limited methodological tools, were produced. These were meant to provide a temporary solution to the problem. Proper *History* textbooks were published only for the following school year 1993/94. This was also the first attempt of the Ministry of Education, Science and Technology (currently Ministry of Education and Science) to

organize anonymous tenders for textbooks and to negotiate the publishing of textbooks under free market conditions.

In 1993, for the first time in the history of Bulgarian education, more than one textbook was offered for the same study program in each subject and grade (OECD 2004a). A free market for textbooks and teaching materials was created under the “Education Modernization Project” funded by the World Bank. The first textbooks made available under this new measure was these of *History*.

Publishers began developing national distribution networks and enticing teachers and experts at Regional Inspectorates on Education, who played an important role in helping teachers to choose among the various textbooks. It should be noted that according to ministry officials currently responsible for the selection of textbooks, NGO experts and inspectors, back then, there were no administrative limitations; there were no regulations and instructions guiding teachers how to make their choice: “*all that existed was a list of approved textbooks to choose from*”. In this sense, the only regulation was the approval of the Ministry of Education and Science (MES), which should make sure that the content of textbooks corresponds to the study programmes.

Since there was no experience with the selection and approval of textbooks nor any specific regulation, this process, which was initially tested as we have said only with *History* textbooks, according to the above mentioned informants, was not objective and transparent enough to eliminate tensions between the publishers and the Ministry. This was also confirmed by the members of the Colibri Publishing house and the Association of Bulgarians textbooks during our interview.

In 1994/98, a series of tenders were organized to select new textbooks for each subject. Alternative textbooks were approved for almost all subjects and grades. The textbooks for upper-secondary education were being distributed by the publishers, while those for lower grades (1-8) were being bought by the MES and then given to the students for free. The free provision of textbooks resulted to be quite expensive though and as of 1999 the MES stopped providing free textbooks except for the first graders.

In 1999/2000, the MES adopted the National Education Requirements for Textbooks and Teaching Materials, as well as the Rules and Conditions for Assessing (MES, 2001a).

In 2002, with an amendment to the National Education Act, the number of alternative textbooks per subject per grade was limited to three. This, in fact, constituted an attempt to regulate the market. Since then, the three textbooks policy is being gradually implemented starting from the 1st grade.

Based on this regulation, the sequence of textbooks' preparation and selection is as follows: the Minister approves a list of books that will be needed. Content standards along with curricula and timetables are published in the Ministry Gazette, publishers and authors must use these state requirements in the preparation of manuscripts. Publishers submit manuscripts to a preliminary Approval Committee by a specific deadline. Competitive bidding is anonymous; bids are opened first by a technical Committee to check that the bids meet technical requirements such as curriculum coverage, illustrations, quality of paper and binding, price and the publisher's statement of solvency. The Minister then appoints a second Expert Commission (4-6 members) for every subject and grade: 1 expert from the regional inspectorate, 1 expert on methodology from the University and 3 teachers i.e. a total of 5 members for each single subject. This Commission judges the manuscript on content, methodology, etc. The third is responsible for the graphic design and illustration, consisted of experts from the Union of Bulgarian Artists. The textbooks that fulfill the requirements in terms of content and illustration pass to the second stage and are being delivered to all Bulgarian schools in order to be evaluated by the teachers. Upon teachers' evaluation, the drafts are signed by the Head of the school and return to the MES. The Commission signs a protocol giving a final rating and up to three "winners" per subject and per grade are announced. From the time the MES announces content standards for a new textbook to the time it appears on a student's desk takes approximately 18 months (OECD, 2004a).

Since the new policy of three textbooks was adopted, no further changes have been implemented in the textbooks provision and selection (as of February 2007). This brief overview of the evolution of textbook policy in the Bulgarian education system reveals two important changes in textbooks policy. For the first time in Bulgaria one curriculum subject can be taught by more

than one textbooks and the selection of textbooks is open to the market for competition among tenders.

11.4.2 Obstacles and resistance to new textbook policy

Bearing in mind that the provision of revised textbooks to reflect the new requirements of the curriculum and the newly established national education standards changed significantly within a decade, we have asked different informants which were the main challenges confronted in applying new policies. The answers given by the informants can be grouped into two main categories, saying difficulties arose from:

- a) the inadequate selection procedure of textbooks; and
- b) the lack of training to educators to select and teach with the new textbooks.

Below, these two factors are being presented based on the opinions of the different informants.

a) inadequate process of selecting and approving textbooks

Educators and members of the social group including editors in publishing houses and members of the Syndicate of Bulgarian teachers in Sofia (46 in total) complained about the length, complex, opaque and expensive procedure for the approval and production of textbooks. This opinion is exemplified in the following statement made by a publisher from the Colibri publishing house:

“Even though the selection procedure seems to be very comprehensive and well designed, giving the opportunity for all the teachers to be part of it, if we speak in terms of numbers, we would see that it is a highly complicated, time-consuming and very expensive procedure (Publisher).

Indeed, according to the results of November 2003, 70% - 80% of all manuscripts presented in MES have been preliminary approved and passed to the second stage⁸¹. Publishing Houses had to print them out and deliver them to all the schools in the country. Teachers in schools had only 6-7 days to evaluate approximately 70 textbooks. The procedure took place in August when schools were closed for the summer holidays and therefore only 600 schools managed to evaluate the books and send them back to the Ministry. 20 000 manuscript drafts have been presented in the MES and have been transformed into electronic formats. A final commission appointed by the Ministry had only 6 hours within 3 days (2 hours per day) to review these protocols and choose the three final for each subject.

A part of the complexity of the selection procedure, educators complained about the lack of clarity and often discrepancies committed in the selection procedure of textbooks. This is illustrated in the statement made by the Head of the Syndicate of Bulgarian teachers in Sofia:

“It is not well defined who should be part of the selection panel which evaluates the textbooks. Publishers bring together a team according to their criteria” (Head of Syndicate of Bulgarian teachers in Sofia).

This opinion was also supported by teachers’ trainers responsible for in-service training and is reflected in the opinion of the Head of the in-serve teachers’ training institute in Sofia who expressed her doubts about the expertise and the competences of the members in the selection panel:

“If the best experts become authors of textbooks, who remains to become member of the selection panel which evaluates the textbooks?” (Head of in-serve teachers’ training institute)

The majority of the educators and inspectors (70%) stated that despite the new policy limiting the textbooks for each subject and for each grade to a maximum of three, the MES often approves more than three, so as to avoid conflict with Publishing houses. As a result, according to the

⁸¹ Information provided by the President of the Association of the Bulgarian Textbooks Publishers during in-person interview in November 2003.

opinion of these groups, there are textbooks in the market that do not fulfill the quality requirements.

Despite the dissatisfaction of administrators and educators on the current practice of textbook selection, the Head of the Textbook Approval Directorate in MES informed us that no changes are planned in the near future on the selection procedure. Indeed as of February 2007, i.e. four years after the interview took place, no changes have been implemented.

The new policy implemented since 2002 that limits the alternative books to maximum three per subject and per grade, was an attempt to regulate the market, and ease and accelerate the selection of textbooks. The opinions of different respondents though on whether this has been achieved were contradictory. While teachers are more satisfied with the new regulation, Publishing houses and authors are very unsatisfied with this limitation in the number of textbooks and said that the new measure has brought corruption and has worsened the quality of the books. Two publishers claimed that authors do not have incentives any more to write good textbooks, as they are forced to decrease textbooks' quality to avoid high costs. The following statement made by a publisher exemplifies this opinion:

“The authors are now afraid to work for 6 months preparing a textbook because they don't know if it will be approved, and for the same reason, Publishing houses do not want to take the risk and pay authors in advance” (Publisher).

Other difficulties and public dissatisfaction arose also due to the fact that there are no limits in the price of the textbooks, as the state, since 1999/2000, pays for them only for the 1st grade. This can lead to the approval of textbooks that are very expensive even for teachers, let alone the children and their parents. Indeed, one book can cost 7 BGN (approx. € 3.5) and each student needs 10-15 books for each year which means 70-100 BGN per year (approx. € 35 - € 51). This should be compared to the salary of a teacher which is not more than 100 euro per month.

The high prices of textbooks could be explained by the following. Publishers who chose to specialize in the production of textbooks and teaching materials early on, in 1992/93, when the Ministry paid for all the print run and provided textbooks to students for free, had established a quasi-monopoly with a few big players sharing the market and it was virtually impossible for

new players to enter the market. As a result of this, the price of textbooks remained persistently high.

Furthermore, there is no formal legal provision for free textbooks for needy-children. The MES provides books for free only for children with special needs and learning difficulties. There is though an active second-hand market of textbooks and some schools have used books available.

All educators and publishers interviewed said that this is a violation of the Constitution which states that:

“education should be free for all until the age of 16 and therefore textbooks should be provided for free for all grades and not only for the 1st one” (Head of Syndicate of Bulgarian teachers in Sofia).

In the school year 2005/06, the MES has bought all textbooks for 1st to 4th grades as used to until 1999. 15 million BGN (approx. € 7 668 616.60⁸²) have been allocated for this purpose in State Budget 2005. This amount, however, came from an extraordinary additional subsidy of 130 million allocated to education from the budget surplus for 2004, and there are no guarantees that the practice will be sustained in future years.

b) lack of training provided to teachers and school directors on textbook selection

All teachers and school directors interviewed complained about not having received any training on how to choose the adequate textbook. They said that they were left alone to choose which textbook to use, based on their students' needs and capacity, and their school's profile. Teachers faced many problems mainly due to the limited time given to them in order to read and select the book they would use during the school year. They explained that the new textbooks have been distributed in schools in the beginning of the academic year, right before the classes were about to begin.

⁸² As of 22 March 2007 based on exchange rates given in the website <http://www.xe.com/ucc/convert.cgi>

We have been informed by the members of the syndicate of Bulgarian teachers that often teachers do not have the freedom and autonomy to choose the textbooks. Many times the textbook to be used throughout the year is imposed by the school director or the regional inspectorate.

It is worth mentioning an illustrative example on the problems teachers are facing in order to choose and teach under a new textbook. Under the new curriculum, for the first time the learning content of *Bulgarian language and literature* included more than one interpretation for the same literature work (see chapter 11.2.2 on changes in the learning content). Different textbooks have been elaborated in order to support this diversity and multiplication of interpretations in the Bulgarian literature. However, according to the opinion of teachers and university professors, this caused a big confusion to teachers and particularly to those who were the eldest in the service. A representative example is what said a university professor who teaches Bulgarian literature in the University of Sofia:

“Teachers were unable to choose which textbook to use as they have been used to have a single interpretation for each literature work. As a result, they denied to use the available and approved by the MES new textbooks. Younger teachers created their own material based on their own notes. This is illegal!” (University professor of Bulgarian literature, Sofia University).

As of September 2004, in an effort to help teachers to evaluate and choose the most adequate textbooks, Publishing houses in collaboration with the MES were preparing a book with recommendations on textbook selection. This guide would be distributed for free to school directors. They were also planning to organize seminars in order to train teachers and school directors⁸³.

⁸³ This information was provided during our interview with the manager of the Colibri publishing house in November 2003.

11.4.3 Changes in textbooks and their impact on the quality

We have asked different informants their opinion on the positive or negative impact that the implemented reforms had on the quality of textbooks. It is quite surprising to find that while it was expecting that the free-market textbook policy would improve the quality of the textbooks, within some groups of informants, it is unanimously believed that the quality of textbooks has been decreased. The way informants perceived the decrease of quality varied however.

Former ministry officials said that the new textbooks do not reflect the same flexibility as the study programs. Before the policy on three textbooks, some books, such as this of teaching French language, could be used for two consecutive years, as the study program could be covered in two years. In this way teachers had more flexibility and freedom to work in accordance with the specific needs of the classroom, however this is not possible anymore.

Students and teachers attributed the low quality of textbooks to the inadequate language in which there are written and the inconsistencies of the data included in different textbooks on the same subjects. Their opinion is represented in the statement of a secondary education teacher:

“Many textbooks are often written in an academic language not adapted to secondary school purposes. There is no consistency in the information provided and some times controversial or false information is being provided, something that causes lots of problems at the time of students’ assessment and evaluation”
(Teacher).

Indeed a study conducted recently by the Paideia foundation on the alignment of *Civic education* standards and textbooks (<http://www.paideiafoundation.org>) revealed that the latter present inconsistencies. Examining the different textbooks available for all grades on *Civic education*, the study showed that important issues and concepts were not included. In particular, according to the findings of the study, there is deficit of knowledge concerning:

- the democratic process. Detailed overview of the functions and role of the executive and the legislative branches of government is included, but there is no information on local and regional governments, nor on the election process;

- the law: there is a false representation of the division of powers, there is no information on the functions and role of the judiciary and the active national legislation, neither on the impact of the international legislation;
- the concept, principles and modern development of market economy, as well as other important issues in view of the country's modern development and European integration. There is a tendency to substitute knowledge on modern developments and phenomena with historical facts and general principles.

Other deficiencies found in the *civic education* textbooks were also inadequate presentation of important values and concepts. For instance, human rights are described in very abstract terms, as some kind of privilege, which society owes to every citizen. This contradicts fundamental democratic principles in which human rights are considered in the context of the equality and are seen as a set of available options, on which the democratic majority has agreed.

Furthermore, there is lack of balance in the presentation of international and national issues. For example, there is a misbalance between information included on international and national judicial and law-enforcement institutions. While there is almost no information on the role of the national judiciary, the system of international judicial and law-enforcement institutions is presented truthfully and in much detail, which could breed mistrust in the national judiciary and court system.

Finally, according to other respondents the quality of textbooks depended on the degree of alignment with the national education standards. As we have already seen (see chapter 11.2.2) opinions regarding the compliance of the national standards with curricula and textbooks differ among respondents and particularly among curriculum subjects. It was interesting to find a divergence in opinion between teachers interviewed and the head of the Syndicate of Bulgarian teachers in Sofia. While all teachers complained about the low quality of the books, the head of the teachers' union said that school textbooks fully comply with and cover national education standards.

Two extremely opposite opinions were heard regarding the compliance of textbooks with the new national education standards. While 83% of teachers, teachers' trainers, students and former

ministry officials are not satisfied with the quality of the textbooks available, the members of publishing houses responsible for these textbooks and university professors who often are authors of secondary education textbooks, as it is to be expected, believe that the quality of the new textbooks is very good. These two contrasting opinions are reflected in the following statements made by the Head of in-service teachers' training institute in Sofia and a publisher:

“Authors are very qualified⁸⁴, for instance the author of History textbooks is a Nobelist but unfortunately they don't know in depth the national education standards” (Head of in-service teachers' training institute in Sofia).

While a publisher said:

“The textbooks reflect the education standards mainly because most of the authors have been personally involved in their preparation” (Publisher).

From the above mentioned statements, one can observe a different perception of what makes a book to be of good quality and what not. Since we were not in a position to analyze the content of the textbooks (due to language limitations), we can only constant that comparing the textbooks used until early 90s and the new ones, significant changes have been made in the quality of paper, the illustration and other elements that at least can make textbooks more attractive to students. In comparison to the textbook of *History*, for instance, used under the communist part, consisting of black and white pages with no illustration at all, very bad quality of paper and long texts written in small letters, the new *History* textbook is much better presented.

⁸⁴ There are not national standards though that determine who is qualified author and who is not.

11.5 QUALITY MONITORING THROUGH INSPECTION

Evaluation ought to be a necessary arm of policy implementation. There is a great variety of approaches to ensure accountability and quality monitoring, the most common being: self-evaluation, peer evaluation, evaluation by inspection and evaluation by standardized tests based on quality indicators. They differ in:

- their closeness to the teaching and learning process, self-evaluation being closer than inspection or standardized tests;
- the roles practitioners play in shaping the evaluation process, practitioners being in full control of self-evaluation but not at all involved in standardized tests;
- their consequences: at one of the spectrum is trust in the market mechanism, so that evaluation results are published and are expected to influence parental choice and thereby the resources that a school receives; at the other end, is what one might call trust in guidance strategies, where the results of the evaluation are primary used for feedback dealing with strengths and weaknesses.

In the case of Bulgaria, the performance of systematic overall monitoring over the operation of the education system has not yet been entirely regulated by law and is not wholly implemented in practice. External evaluation in the field of secondary education is exercised by the Minister for Education and Science, the experts of the same Ministry, the Regional Education Inspectorates (REIs), and the heads of schools and deputy heads responsible for education. The Minister for Education and Science exercises control over the activities of all types of schools, servicing units and levels of education (MES, 1991, Art. 34, par. 1). Regional Education Inspectorates are the local subdivisions of the Ministry of Education and Science in the management and monitoring the public education system (MES, 1991, Art. 34, par. 2).

Control in the field of secondary education is exercised pursuant to: the Code of Implementation of the National Education Act (MES, 1991), the Regulations for REIs activities, instruction No.1 of 23 January 1995 (MES, 1995b), Ordinance No. 3/2003 for the

system of assessment and the job descriptions of the abovementioned persons, i.e. experts in MES and REIs, and heads of schools (MES, 2003b).

Periodical analyses and research related to the evaluation of the quality of the education system are systematically carried out. The state institution most fully engaged with research on the education system and its various aspects is the National Institute of Education at the Ministry of Education and Science. This, together with specialists from higher schools and other scientific organizations, conducts research activities in compliance with a national programme through national and international projects. Examples of systematic analyses of the weaknesses and achievements of the education system are the preparation of the Strategy for the Development of Secondary education in 2004-09 and the national reports for the development of education presented once in every two years for the purposes of the UNESCO's International Bureau of Education.

In our study, we examined the quality monitoring of the educational system through the supervision made by school inspection. The main functions of the experts working in the Regional Education Inspectorates are described below.

The experts on the organization of the secondary education in the Regional Education Inspectorates are responsible to review and evaluate (according to instruction No. 1/1995 art. 6) management activities of the principals and deputy principals of the schools in the execution of the school legislation, the normative documents, the Labour Code and keeping the school documentation (Bulgarian Government, 1986).

The experts on the general educational subjects in the Regional Education Inspectorates are responsible for review and evaluation of (according to instruction No. 1/1995, art. 5):

- the execution of the State educational requirements;
- the results of the tuition on respective subjects through exams, tests, surveys, case studies and others;
- the organization of the educational process;
- the holding and the results of the entry and exit exams to secondary education, the state qualification exams, competitions and others on the respective subjects.

The experts on finance and economics in the Regional Inspectorates review and evaluate (according to instruction No. 1/1995, art. 7):

- the financial and economic condition of the education in the region and in the schools;
- their relationship with the municipalities;
- keeping of the financial documentation and others.

Developing and introducing an improved system for inspecting, monitoring and supporting schools in the process of implementing the new content of education has been one of the main objectives of the 1st component of the Education Modernization Project (EMP) funded by the World Bank, to which we have referred earlier on in our study. In this chapter we will examine, based on the interviews held, the different stages of implementing the planned reform in the inspection system and the impact that these changes had on the role and functions of the inspectors.

11.5.1 Implementation of school inspection reform and possible delays

Reforming the inspection system has been one of the most underdeveloped areas of the government agenda for educational reform in Bulgaria. Real work on revising the inspection system started as late as May 2003, i.e. four years after the adoption of the new curriculum framework and more than a decade from the beginning of the democratization of the society.

In the period 2001-2003, a scientific team of the National Institute of Education developed a project for monitoring the activity of schools. Models for evaluation and school monitoring were developed on the basis of conducted theoretical and empirical research (ASIARP, 2003a).

A new Inspection Division was created within the Ministry of Education and Science so as to implement and monitor the activities set under the Education Modernization Project (EMP). A national consultant on inspection has been contracted to develop a new inspection

model and the members of the Regional Education Inspectorates (REIs) have been invited to express their visions. Based on the proposals received, six pilot municipalities were identified to provide the ground for testing new inspection models. The criteria used to identify the pilot municipalities were: the quality of the proposals made in view of the functions and the new roles of REIs in the current situation; competences of the experts involved; and, the specifics of the location. The selected regional inspectorates were: Sofia, Blagoevgrad, Varna, Veliko Turnovo, Silistra and Sliven. The first meeting between the MES officials and the inspectors from the REIs from the pilot municipalities to discuss the current status of the regional inspectorates was held in the 3rd and 4th of July 2003.

A new framework for inspection was piloted in 2004 but the results were not encouraging. Feedback suggested that the system is very complicated and if it is introduced with the current resources of Regional Education Inspectorates, this would mean that schools will be inspected every 6 to 9 years on the average. The framework for inspection was revised based on the feedback received and it should have been implemented in 2005 as a pilot project in Sofia. However, due to financial restrictions, this was not made possible.

In the meantime, an action plan on the development of National Education Standards for Inspection was elaborated. The preparation of these standards should had been completed in April 2004, however, as of September 2004, there were not yet ready, and according to experts from the regional inspectorate in Sofia, the final outcome will be delayed significantly.

In the following section we will examine what were the main difficulties encountered in order to implement the planned reform in the inspection system, which preview the introduction of a new Framework and National Education Standards for Inspection.

11.5.2 Obstacles and resistance to a new inspection system

Bearing in mind the significant delays in applying the planned reform in the Bulgarian school inspection system, we have asked 30 ministry officials, 10 members of the regional inspectorate in Sofia and 7 teachers, what were the main challenges faced in order to carry out this reform (see questions of the interviews in annex 20).

The above mentioned groups explained that important difficulties arose in agreeing on the national education standards for inspection. They said that this was to be expected since there is no clear vision at national level about the role and the functions of the REIs. According to them, this latter is an outcome of the not well defined principles of the Bulgarian education system and its level of decentralization, i.e. the principles of governance and control over the education system as whole; the requirements of the teaching and learning process and the quality of its output; as well as the mechanisms for assuring this quality.

In addition, teachers opposed to the implementation of the new framework for school inspection piloted in 2004. One of the fundamental problem understood by the actors involved in developing this new model for inspection, was the lack of having criteria for assessing the quality of education, the lack of an external system of student assessment and the lack of a system for assessing teachers and headmasters' performance. Within this unfavorable context, teachers felt that the proposed framework for inspection allowed for a lot of subjectivity.

This in turns brings us once again to the significant issue about the coordinated development and progress of reforms in all the interrelated elements of the educational system. The development of national education standards for inspection, the national assessment standards for students and the external system for students assessment, are indeed complementary elements for optimizing the efficiency of the teaching and learning process and improving its quality. The successful implementation of a new curriculum is an inseparable part of this process. In the Bulgarian case, it is obvious that delays in developing an external evaluation system for students directly affected the development of a new

framework for inspection oriented to monitor and support schools in the process of implementing the new content of education.

11.5.3 Changes in the functions and role of secondary school inspectors

In our question on whether the role and main functions of the inspectors have changed due to reform, we have received quite negative opinions from all three groups of informants: educators, policy-makers and the social group including parents and students.

95% of the school directors, teachers, teachers' unions and experts from the NGOs interviewed consider that the role of the inspectors at the current stage is unsatisfactory. They said that it is mainly supervisory and the control they exercise is sporadic and ineffective. While there is a general agreement on the inappropriate function of school inspection, the degree of dissatisfaction with the work of inspectors and their interaction with schools varied among different respondent groups.

School directors were the most critical. They all agreed that the role of inspectors should change. Some of them said that the current inspection system does nothing to improve the performance of the teaching staff and the quality of education. Respondents of this group noted that inspection visits are too rare and do not contribute in improving the actual situation in a given school. In this respect, the following statement made by a school director in Sofia is representative of this opinion:

“During the 6 years I am School Director, I received two visits from inspectors” (School Director).

All teachers agreed that school inspections do not take place regularly and they have attributed this to the lack of human resources which create an overload to the experts working in the respective regional inspectorates. They explained that since usually there is only one expert in each inspectorate for a given subject, he/she is too overburdened to be able to visit all schools. Representative of this opinion is the statement made by a teacher:

“Inspectors are brilliant but they are absent, to be honest, I have never seen one” (teacher).

Indeed, inspectors visit schools when they have received a complaint or they have been informed of some violation or wrongdoing. Despite the fact inspection is practically the only mechanism for monitoring quality of teaching and learning processes in the country, serious and comprehensive inspections are made only every three years and these rarely lead to actual changes. Inspectors themselves said that the lack of regular inspections makes difficult the necessary coordination of the MES, the inspectorates and the schools.

Both NGO experts and school directors said that inspections are subjective and fragmented because they are not based on clear criteria. Therefore, the process of evaluating the performance of teachers and school directors is ineffective. However respondents understand that this is not due to lack of professionalism and expertise of the inspectors but because of other factors, such as the inexistence of clear criteria and standards and the lack of personnel. It is illustrative the justification given by an expert working in the Paideia Foundation who said:

“Inspection lacks a clear framework, it lacks mechanisms for monitoring education quality, but also adequate and sufficient human resources: a Regional Inspectorate which is responsible for 120-160 schools, has 8-12 experts. When inspections are conducted, focus on formal, easily measurable criteria such as availability of required documentation, enforcement of labor discipline, general conditions in schools, etc.” (expert from NGO).

This overload was confirmed by the inspectors themselves who coming to justify why an inspection might not be effective, commented that one of the most significant problems facing school inspection currently is often the lack of measures taken to apply the findings of their inspection. For instance, no action is being taken to replace those teachers who are proved to be “not good enough” during an inspection. In other words, they said that there are no mechanisms with which inspectors could exert influence for solving a given problem, and this renders control meaningless.

In our question what are the main changes needed in the Bulgarian inspection system, respondents believe that the inspectors' functions, which are now chiefly that of a control body, should change to guarantee methodological guidance and support. The inspection procedures should be reformed to become an effective quality control mechanism. Also, teachers highlighted that if it is for educators to trust inspectors, measures should be adopted to raise their social status and make their selection procedure transparent.

CHAPTER 12. THE IMPACT OF CURRICULUM REFORM ON TEACHER EDUCATION

Teacher repertoires have been shaped by the crucible of experience and the culture of teaching. Policy makers need to understand that altering pedagogy requires a change in what teachers believe. Getting professionals to unlearn in order to learn, while certainly not impossible, is close in magnitude of difficulty to performing a double bypass heart operation than to hammering a nail.

Larry Cuban, 1986

The basic insight of a systemic reform, to which we have referred in our previous chapter, is to suggest that no element of an education system -such as the curriculum for instance- can be considered in isolation from other elements. Hence, in this chapter, teacher development is regarded as closely related to the other matters dealt with in this study: curriculum and assessment in particular.

It is often repeated that teachers ought to be the leading agents of change, but instead, they could become the main obstacle to it. Those planning change have to acknowledge, in the first place, that teachers are an integral part of educational success. It is unwise to adopt an impatiently rapid approach to curriculum reform without involving teachers in its development and application. Curriculum change should be ambitious but measured, in order to involve teachers properly in all phases, while resources should be available to them on an adequate scale. Teachers may have to choose between impersonal presentation of systematic knowledge structures and personal involvement in controversy; between the strengths of specialization and the need to cross-disciplinary boundaries; between transmission of knowledge and generation and reflection on it; and between top-down communication and peer organization.

The work of teachers in generating new knowledge is more widespread than is generally realized by different stakeholders. Research studies on implemented reforms in different educational systems have shown that teachers are far more likely to collaborate, if they are directly involved in defining the curriculum and its assessment (CERI, 1998, p. 89-117). As to be expected, in the opposite case, i.e., in the absence of prior consultation and appropriate incentives given to teachers, they may impede change or may make no effort to implement a

reform proposed by education authorities at whatever level. Indeed, as we have already discussed in the previous chapter (see chapter 11.2.4 on problems encountered in implementing the curriculum reform), this last was made obvious in the case of secondary curriculum reform in Bulgaria. We have seen through the voices of different stakeholders and the civil society that the curriculum reform can't be carried through effectively without the understanding and commitment of teachers. In other words, if teachers are merely treated as deliverers and not as joint owners of the curriculum, any effort made by policy-makers for reform, might be in vain. It is important therefore to be given to teachers some sense of power over innovation, while space in national guidelines should be left for them to apply their own professional judgment.

However, change must focus not only on the individual teacher but also on the school in its whole, if it is to become an effective learning environment. If an evolutionary model for curriculum change is to be adopted, it implies that teachers participate in a dynamic interaction to it, with control management, teams of teachers, and individuals sharing responsibilities. Teachers should respond through their national, practical experiences and through feedback reports on their interpretations and successes. To carry out its task, a school also needs to take initiatives in its local community by involving parents, employers and others in its work. Thus, a tradition of change has to be established which sees innovation part of a continuum and not as episodic events.

Nowadays, different countries around the world have realized that the responsibility of teachers and schools is more extensive than in the past (CERI, 1998, p. 92). They are given a major role in contributing to a whole array of economic, social and cultural issues, which often have their root causes well beyond the school's ambit. As the role of teachers is changing and is becoming more complex and multifaceted, the concept of teachers' career development within a given school becomes increasingly more important.

Thus, education policies in different OECD countries target to two aspects of developments: personal and institutional. To do so, on one hand they aim to build on the capacity of future teachers to bring about change within the school system, using such measures as:

- strengthening and modernizing the curricula in initial training courses;

- introducing special induction courses for beginning teachers;
- including admission requirements to the teaching profession;
- adopting quality standards of training provision;
- assessing regularly and constructively teachers' performance;
- giving career incentives; and
- raising standards of teachers' work.

On the other hand, the increasing freedom given to institutions and the linking of schools into virtual networks is being seen as an important factor to open up peer work among schools and to create adequate learning environments (CERI, 1998, p. 89-117 and OECD, 2005).

While increasing demands are being placed on initial teacher education in the OECD countries, special attention is also paid to the in-service training of the active practitioners. National policies on reforming in-service training have demonstrated a tendency to decentralize responsibilities down to the level of education institutions. At the same time, the central authorities have often issued guidelines in order to safeguard compliance with minimum quality standards and improve consistency between initial teacher education and in-service training. Another important trend quite common in OECD countries is making the in-service training compulsory at all stages of a teaching career. This great importance attached to in-service teacher training indicates that the concepts of lifelong learning and continuing skills development are becoming increasingly common at international level within the teaching profession.

From what we have just said, it becomes immediate obvious that there are varied needs if teaching and learning are to be pursued in a more professional context. It is necessary to define the competences required for teachers in order to put into practice such classroom reforms, and to adequately train them to translate the new theories of policy-makers into action. Several OECD countries have developed their curricula in directions similar to those observed in Bulgaria today (OECD, 2004a, p. 47). Experience shows that the more diverse and complex the process of learning and its expected outcomes are, the more difficult is for teachers to cope with. In other words, the greater the flexibility and complexity of the

curriculum is, the greater the demands are on teacher competence, teacher involvement at school level and school culture.

The new national education standards, the new curriculum framework and the new policy of alternative textbooks adopted in Bulgaria upon the change of the regime (see chapter 11), enhanced greater flexibility and broadened choices for both students and teachers in the Bulgarian secondary education. Teachers on one hand can now choose among three textbooks the most adequate for their students, they can fundament and link the principles of their subject with other subjects within the same curriculum area, while students on the other hand can choose the subjects of their preference offered in the school based curriculum.

These new developments however brought to the surface the very important issue of the capacity of teachers to deliver the new curriculum successfully. From a regulatory point of view, the new curriculum was introduced with the acts already mentioned earlier (see chapter 8.1.4 on legislative framework), its practical implementation however, required active support from teachers and school administrators to ensure that the goals of the modern Bulgarian education can be met.

These new needs and challenges arising from the curriculum change implemented in secondary education in Bulgaria since 1999 can generate a series of reasonable questions: are future Bulgarian teachers being prepared to face the new reality in the Bulgarian schools? Have the active practitioners in secondary schools been trained to deliver properly the new learning content? Which are the key competences that Bulgarian teachers should display in order to make the reform a success? And do they display them? The purpose of this chapter is to answer to these questions adopting a triple focus:

- Firstly, it aims to examine up to what extent changes implemented in the secondary education curriculum in Bulgaria were aligned with changes in the initial training of the future teachers as well as in the continuous training of the active practitioners.
- Secondly, it describes the opinions of the different actors concerned on the degree to which the existing teachers' education and training system prepares successfully the

Bulgarian teachers to acquire the appropriate competences to teach in the knowledge based society of the 21st century.

- Thirdly, it presents and comments on the expected competences that the different actors involved in the education system believe that secondary education teachers should have in order to teach under the new curriculum.

The following sections are structured according to these three topics. The information included in this chapter is based on the data collected from the different informants interviewed in Sofia between 2003 and 2007 and on the analysis of the 201 replies received from the questionnaire administered across Bulgaria (see chapter 10.3 on investigation tools and chapter 10.4 on selection of informants).

With the ultimate goal to examine the impact of the secondary education curriculum reform on teachers' education and training in Bulgaria, we consider it important to collect and analyze the opinion of policy-makers, practitioners and receivers of secondary education on this reform. The opinion these actors have on the way the reform is bringing forward can show the degree of their implication in this reform, which in its turn, may determine its success or failure. Therefore, beyond the need to analyze the objective data on the concrete changes made in the teachers' training to support the new curriculum (courses in offer, changes in the provision of pre-service and in-service training, etc.), we also considered highly significant to collect and examine the subjective opinion of the actors involved.

12.1 PRE-SERVICE TEACHER EDUCATION AND TRAINING

Teachers as key mediators and formative agents of the young generation have a central role to play in the transformation of the Bulgarian society.

According to the principles and aims that underpin the education system, teachers are expected to promote the knowledge, attitudes and skills which will enable youngsters to live productively within their changed society (Article 15 of the “Public Education Act” and articles 8 and 9 of the “Law on the Level of Schooling, the General Education Minimum and the Syllabus”).

As we have seen in the previous chapter, new learning content has been introduced in secondary education, which requires a more integrative teaching style encouraging learners to question, surmise and take risks. Teachers under the new curriculum framework are expected to work together, and be open to more productive relationships with parents and local communities. These changes pose great challenges to the capacity and motivation of teachers, while make necessary the need for their appropriate formation before entering the teaching profession. It is to be expected that the way future teachers are being educated will determine the success of the curriculum reform.

In the following sections (chapters 12.1.1 and 12.1.2), we will present the pre-service system for teachers’ education in Bulgaria and the recent changes made to comply with the reformed secondary education. In particular, we will examine the possible changes that may occurred in the institutional, legislative and curriculum framework of the pre-service training for secondary education teachers; we will present the opinions of the various stakeholders and other actors concerned on the quality of pre-service training provision in the country; and we will discuss the results of our survey on the degree to which the existing pre-service education system prepares successfully the Bulgarian teachers to acquire the appropriate knowledge, skills and competences to teach in the knowledge based society of the 21st century.

12.1.1 Pre-service teacher training provision and recent reforms

The initial training of teachers is carried out in the framework of higher education. In continuation, we will present the evolution of the pre-service teachers' training provision over the past few years and the training models and curricula currently in use.

a) the evolution of pre-service teachers' training provision

The recent history of higher education in Bulgaria provides a fascinating case study of a higher education system in transition. It needed to discard many of the inhibiting features of the older era and to devise a host of new policies and procedures in keeping with democratic principles and a greatly changed socio-economic order (OECD, 2004a.).

For almost half a century, prior to 1990, Bulgaria's higher education system had been shaped in the Soviet model. It was strongly state controlled in terms of ideology, curricula, organizational and administrative framework. Of the 30 higher education institutions (HEIs) existing by 1989, only three -the Universities of Sofia, Plovdiv and Veliko-Tarnovo- were multi-disciplinary institutions. The others followed the specialized professional training institute model favored by the Soviet approach, i.e. there were pedagogical, technological, agricultural and medical institutes. The predominant course model was the Master's Degree, usually following a five-year course structure. Further graduate studies were highly selective, with the government determining the number of students going forward for the degree of a "science candidate", equivalent to doctoral studies. The number of entrants to each course was centrally determined and the curricula laid down in detailed format stressing subject-mastery and ideological orthodoxy. Student teacher ratios were low -at about 7.5:1- student lecture loads were heavy -at about 30 hours per week- and the style of lecturing tended to be of a formal expository type. Student enrolment in higher education was traditionally small, numbering 101 000 in 1980. However, a significant increase in students' enrolment took place in the 1980s, so that by 1988/89 almost 127 000 students were enrolled (Eurydice, 2003d).

The political changes of 1989 created a greatly different context for the Bulgarian higher education. The adoption of a democratic political regime oriented towards a market

economy and greater international integration, created a framework for higher education in strong contrast to what was existing before.

As early as 1990, the “Academic Autonomy Act” was passed providing a much more open, flexible and liberal developmental framework for higher education. Institutions were granted full autonomy; the establishment of private institutions was authorized; courses could be developed without having to comply with designated standards; fees for teaching were permitted; new branches of existing institutions could be established; and so on (Eurydice, 2003d).

The heady excitement of the new deregulation policy though, soon gave rise to concern that higher education was evolving in a rather chaotic way, which could imperil its quality. Over 100 new faculties were established, programmes increased from 150 to 490, five private universities were established, a multitude of outreach branches of higher education institutions mushroomed. Student enrolment expanded enormously in a short time and higher institutions opened their doors to students who were able to pay tuition fees, and who often were admitted based on lower qualifications than the state-supported students did. The total number of students in higher education increased by about 95%, from 127 000 in 1988/89 reaching 248 570 in 1995/96 (OECD, 2004a, p. 128)⁸⁵.

By the mid-1990s, the government had become concerned about its lack of control over developments in higher education. Thus, in 1995, the “Higher Education Act” replaced the “Academic Autonomy Act”. This was a much more regulatory measure, which sought to establish a balance between the authority and responsibility of the state on higher education and what the state regarded as the appropriate degrees of autonomy and freedom of the institutions in the conduct of their affairs. This autonomy included for instance the right of the staff in higher education institutions to elect their own rectors and governing bodies independently of the state and the freedom to teach according to the

⁸⁵ As of 2001, there are 91 higher education institutions (Higher Schools) in Bulgaria. There are 47 universities and equivalent institutions, including 33 public universities and higher institutes, 6 military institutions, and 8 private universities. In addition, there are 47 colleges of which most are attached to universities, and 6 of these are private. The Higher Schools are located in 26 towns throughout the country and cater for a total of 234 604 students (OECD, 2004a, p.129).

institution's academic standards. Each faculty gained the authority to create their own curriculum and study plan, and this greater freedom of the different departments was significant for their improvement (Eurydice, 2003d).

Since 2002, under a new amendment on the "Higher Education Act", all Master Degrees are offered against a fee. Now students have to pay around 1 500 BGN (€ 767⁸⁶) for a Master degree (this means 500 BGN= € 255.67 for each semester, as usually there are three semesters). There is also a provision for limited free places (20 for instance for the Masters in Philosophy). These places are paid by the state to those students who receive the best grades in the entry University exams.

As a result of this new regulation, the number of students participating in Master courses has been increased significantly; while professors have enough hours of teaching and the freedom to develop new programs and ideas: 300 different Masters were developed and were available in 2004⁸⁷. These programs attract new and young professors, experts who currently work in other institutions, NGOs, etc. to come and teach at the universities bringing new ideas and methods of teaching. Recent intentions are being focused to further increase the freedom to develop new programs and to establish autonomy of the budget management of each Master program⁸⁸.

With the latest amendments of the Higher education Act, in 2004, a system for transfer and accumulation of credits was introduced in order to provide students with the option to choose subjects, work independently and have higher mobility.

⁸⁶ Based on rate exchange given by <http://www.xe.com/ucc/> as of 31 May 2007.

⁸⁷ A specific postgraduate program takes place only when a minimum of 7 to 8 students request it.

⁸⁸ Data collected through personal interview with a University professor of Mathematics, in the University of Sofia in November 2003.

b) training models and curricula

Pre-service education for secondary education teachers takes place in 10 institutions operating within a university framework. Teacher's professional qualification can be obtained in two models, the concurrent and the consecutive:

- In the concurrent model, students pursue their academic subjects –such as mathematics, history- in the relevant faculty of the university, and those who decide to become teachers, take in the same time additional courses in the Faculty of Education.
- In the consecutive model, the teaching qualification is being acquired after graduating the major speciality: those who are willing can enrol in a qualification course to become teachers either immediately after graduation or after some time.

The most typical model to become a teacher in Bulgaria is through the form of the concurrent education. While there is no alternative provision for acquiring a teacher's qualification apart from these two main training paths (concurrent and consecutive), when there is urgent demand for teachers in a specific subject, teachers in other subjects who already have a teacher's qualification, can take a qualification course in the subject for which there is lack of teaching personnel.

The qualification course to become a teacher, in either of the two models mentioned above, includes both theoretical education and practical training under predefined unified educational minimum requirements (MES, 1997a, art. 15 par. 1) (see Annex 16: Regulations on the Unified State Standards for obtaining Teaching Capacity).

The theoretical education in the professional course for future teachers is based on lectures, dialogues and self-training. It comprises analysis of literature sources, document research, development of topics and projects, and consists in compulsory, optional and extra subjects.

The minimum number of compulsory subjects and its time allocation consists in four elements:

- Pedagogy (theory of education and didactics): 60 academic hours;
- Psychology (adult psychology and pedagogical psychology): 45 academic hours;

- Audio-visual and information technologies in education: 15 academic hours;
- Didactics/Methodology of teaching the chosen subject: 60 academic hours (MES, 1997a, art. 7).

15 hours should be allocated to each of the optional subjects which depending on the orientation of each speciality, they are divided in two groups:

- pedagogic, psychological and methodological subjects; and
- interdisciplinary, applied and experimental subjects related to the area in which the teacher specializes.
- From each of these two groups, students must select at least one or two subjects (MES, 1997a, art. 8).

Students are also expected to do about 120 hours of teaching practice in schools⁸⁹. The practical training, during which students must deliver personally between 10 and 22 lessons, shall be provided in forms and academic hour allocations as described below:

- Monitoring and analysis of classroom lessons – 30 academic hours
- Ongoing teaching practice – 45 academic hours
- Pre-graduation teaching practice – 75 academic hours (MES, 1997a, art. 9)

The “Monitoring and analysis of classroom lessons” represents observation and analysis of lessons and other forms of education, under the immediate supervision of a professor from the higher school. The “Ongoing teaching practice” consists of visits to schools, observation of lessons and other forms of education in preparation for the “Pre-graduation teaching practice”. This latter consists of personal participation in the educational instructive process, under the supervision of a school teacher and a professor from the higher institution.

Teachers for special schools are trained in a defectology programme or receive additional qualification in this field specializing according to the category of pupils with special educational needs that they are going to work with (speech therapists, pedagogues for

⁸⁹ Higher institutions arrange practices for students under a contract with state-run or municipal schools or kindergartens. Schoolteachers who participate in the student practice are paid an additional percentage of the basic monthly salary (Eurydice, 2003d).

hearing impaired students, etc.). Sports and arts teachers are specialists in the respective sport or art who simultaneously acquire capacity for teaching.

During their education, students pass exams in all of the compulsory and optional subjects. The training for acquiring the professional qualification of a teacher ends with an integrated practical and applied state exam, which consists of a delivery and defense of a lesson developed by the student. The state exams are carried out in front of a state examination commission, whose members are appointed by an order of the higher institution's rector. The commission includes the teacher who supervised the "pre-graduation teaching practice". The qualification of a teacher is being attested by a certificate attached to the diploma for a graduated degree of higher education (MES, 1997a, art. 15 par. 1 and 2 and art. 16 par. 1 and 2).

12.1.2 Quality of pre-service teacher training: interviewees' opinions

As we have already underlined earlier on in this study, the opinion the different actors involved in the education system have on the way the reform is being carried out and the degree of preparation of teachers in secondary schools to successfully deliver this reform is highly significant for our study. Their degree of satisfaction with the current provision of initial teachers' education may alert us on potential challenges for implementing the new curriculum and help us to identify the degree of teachers' and other actors' commitment in the ongoing reform.

To this end, we have asked the different groups of informants: 18 educators (teachers, university professors, trainers), 50 administrators (ministry officials, inspectors, school directors, directors of teachers syndicates and the 28 representatives from the social group (students, parents, NGOs, publishing houses) to express their opinion on the current quality of pre-service training of teachers. We have asked them in particular to specify the quality in terms of three issues of interest (see chapter 10.2.2 Elements under examination):

- a) the democratization of the curriculum;

- b) its alignment with the reformed secondary education: the new national education standards and the new learning content in secondary schools; and
- c) the relevance of the training models in use.

a) democratization of the curriculum

We have asked the three groups of informants whether the curriculum of pre-service training for teachers has been cleansed from ideology (see chapter 10.2.2. Elements under examination). According to the statements of six University professors belonging in the departments of Philosophy, Sociology, and Bulgarian language, the curriculum of the pre-service education has been revised after democratization and all the ideological elements have been removed alike the rest of the education system.

In the department of Philosophy for example, in 1990, the following ideological subjects have been removed from the curriculum: *History of the Bulgarian communist part; Political economy; Historical materialism; Dialectical materialism; Brain activity: how the mind works; Civil defense in case of war; Lenin*, etc. New subjects have been introduced to reflect the new democratic society, such as: *Philosophical Anthropology; Social Philosophy; Philosophy of Science; Philosophy of Law; Eastern Philosophy; Byzantine Philosophy; Philosophy of Religion*; while more hours are being dedicated to *History of Philosophy* to cover a much broader content than before.

The depolitization of the learning content though was a slow process, as three university students interviewed explained to us. In late 1990, about 50 000 Sofia University students demonstrated against the poor education and the continued persistence to attend courses in Marxism. Their protest caused the university to eliminate all the compulsory political indoctrination courses. A year later, the 1991 “Law on Public Education” declared that “*no political activity is allowed in the system of public education*”.

As it is well known, the democratization of the curriculum does not refer only at the degree to which the learning content is democratized, but also depends on the space and freedom it gives to

students to choose the subjects they would like to be taught. To this end, a new credit system has been introduced in 2004 to offer more flexibility to students and enhance their mobility.

According to the opinion of the ten university professors interviewed though, the way this credit system is organized does not result to be very effective in terms of curriculum flexibility. The explanations given by a University professor are worth mentioning:

“If students had more freedom to select the subjects they want to study, many professors could stay without job or at least with not enough hours of teaching. Due to professors’ opposition and great effort to preserve their own subjects, more reforms are targeting today at the postgraduate studies rather than at the bachelor level”(University professor of Philosophy, University of Sofia).

b) the alignment of pre-service training with the reformed secondary education

Based on the feedback we received from the 18 educators interviewed, the degree to which the learning content of the current pre-service system is linked to this of secondary education varies from subject (specialization) to subject.

Two professors from the department of Mathematics and Informatics in the University of Sofia stated that several attempts to modernize the courses of pre-service education have been made since 1995 when the Universities gained their autonomy, and new courses on students’ assessment and daily evaluation have been introduced. According to their opinion, the current pre-service system is more linked to the secondary education and much more modernized than before.

However, university professors from the faculties of Philosophy, Bulgarian language and Sociology, teaching more theoretical oriented subjects, have a different opinion. Three university professors claimed that in practical terms, there is no link between the curriculum of the pre-service training and this applied in secondary schools. Furthermore, according to their opinion, the National Education Standards introduced in the school system are not officially integrated in the subject matter of higher education. The statement made by a

professor of sociology from the University of Sofia is representative of the opinion the other nine University professors interviewed had:

“Some professors who have been involved in the preparation of the education standards for secondary schools, try to apply some of them in the curriculum they teach in the University, but this is definitely not a systematic approach” (Professors of Sociology, University of Sofia).

The overall conclusion drawn from all the interviews held with university professors and policy makers (40 in total) is that reforms in the higher education do not follow the same speed of the reforms in secondary education. According to all interviewees, this is mainly because *“since Universities became autonomous in 1995, they fall out of the public attention”*. Five interviewees from the group of educators attributed the lack of alignment of the education reforms between the school system and the higher education to the existing mentality of the staff in the universities. According to these informants, due to the strict hierarchical structure of the Universities, the same people as of before 1989 are still the core teaching force in higher education. Therefore:

“Without “new blood”, people with new ideas and democratic formation, reforms are not very likely to be implemented” (University professor of Philosophy, University of Sofia).

c) training models in use

The opinions on the quality and adequacy of the training models in use in the initial training of secondary education teachers vary among different groups of informants. While most of the university professors interviewed (8/10 people) seemed quite satisfied with the overall quality of the training models, teachers and experts believe that universities still use to a great extent old methods and approaches of training.

The current training model indeed is close to the traditional one in some other former Soviet bloc countries (OECD, 2004a). The emphasis is on the mastery of subject content, intended to be delivered in a predominantly expository teaching style. A major problem

with this tradition is that even university teachers who may display an admirable interest in the pedagogic dimensions of their academic subjects are likely to be far removed from the new approaches to schooling, both in terms of practical experience and of conceptual understanding. This fact is well represented in the statement made by an education expert who said:

“Students who have chosen to take pedagogical courses learn mainly how to present and prepare lessons in the form of a lecture. New approaches to education, new teaching methods and new concepts are seldom offered by university professors because they are too far from the actual school conditions and real teaching practices” (NGO expert).

The pre-service curriculum focuses more on the subject matter knowledge. The pedagogical content knowledge is obligatory for some specialties only; for example, the pedagogical courses are optional for all teachers of foreign languages. All the 18 respondents from the group of educators also confirmed this. According to them, the 60% of the total time devoted to the curriculum of *Mathematics*, the 70% of *Philosophy* and the 90% of *Foreign languages* is being attributed on subject matter knowledge. Accordingly, little importance (10% to 40%) is dedicated to pedagogical content and the development of new skills. All university professors (10/10 people) agreed that for more effective training, more weight should be given to pedagogical courses than to those transmitting the subject knowledge. The proposition made by a university professor of Mathematics from the Sofia University complements this opinion:

“To give more emphasis on pedagogy, could happen if new knowledge is reduced or if simply the content is re-organized within some subjects. For instance, in Natural sciences, the same knowledge is repeated in Chemistry and Physics” (Professor of Mathematics, University of Sofia).

Informants from all three categories, teachers (5/7 people⁹⁰), inspectors (9/12 people), education experts (2/2 people) and the Director and members of the Bulgarian Teachers Syndicate (5/5)

⁹⁰ The four members of the Bulgarian Teachers Syndicate in Sofia are also including as they are also teachers in secondary schools.

interviewed feel that future teachers do not receive proper education on how to work with diverse classrooms, children with special education needs or/and ethnic minorities. The opinion of these informants is well reflected in the critical statements made by an expert from the Open Society Foundation and this of the Head of Bulgarian Teachers Syndicate in Sofia:

“The pre-service education is very archaic. Nothing has changed in terms of special needs pedagogy and general pedagogy” (expert from NGO). *“It should be reformed. Students should receive training on foreign languages, ICT, civic education, and should acquire competences to teach in diverse classrooms and to children with special educational needs”* (Head of the Bulgarian Teachers’ Syndicate in Sofia).

Indeed, different authors highlight the inefficient preparation of future Bulgarian teachers to work in diverse classrooms, a fact that hampers the mainstreaming of children with special education needs and minority groups in Bulgaria (OECD, 2004b).

Three interviewed teachers and two school directors who have supervised the practice of future teachers (current university students) in classroom expressed their concerns. According to their opinion, future teachers are insufficiently prepared to work in real settings. The opinion of these groups are well represented in the words articulated by a School Director:

“University students when come to schools for practice face for the first time the real situation, in most cases they have not even seen the textbooks before” (School Director of the 23rd General school of Sofia).

To further expand our sample of research on the opinion the different actors have on the quality of teachers’ education, we have asked 201 informants to tell us whether they believe that the established system of pre-service training prepares successfully the Bulgarian teachers to acquire the needed competences, knowledge and skills to teach in secondary education, meeting the needs of the knowledge based society of the 21st century.

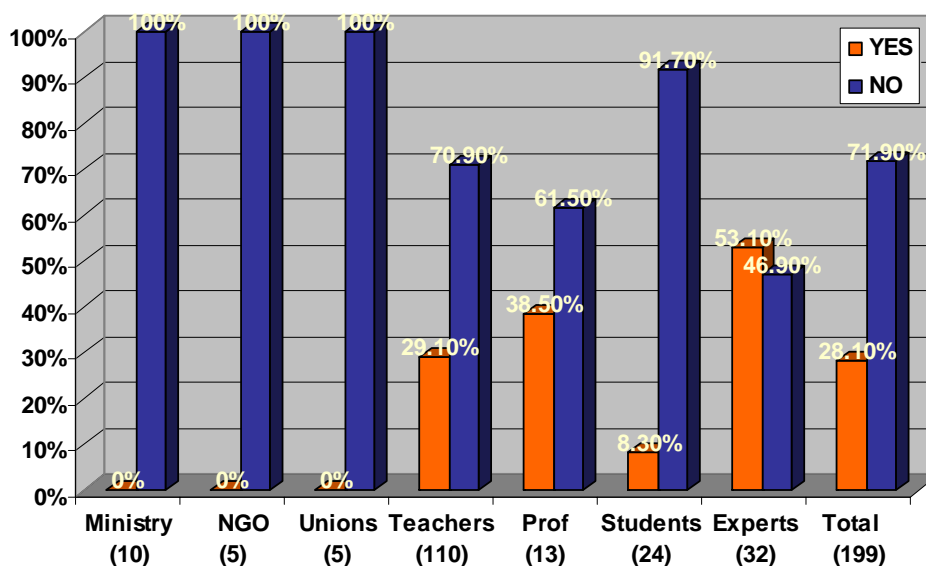
We have received 199 responses and the results of our survey are rather disappointing given that the majority of the respondents, 71.9%, believe that the current pre-service teachers' training system does not prepare successfully Bulgarian teachers (see figure 12.1).

The findings allow us to identify three groups of opinions. The first group of respondents, comprising ministry officials, experts from NGOs and the members of the Bulgarian Teachers' Syndicate in Sofia is 100% negative on the quality of the pre-service teachers' training, defining unanimously the system as completely inappropriate. In the second group belong secondary education teachers, university professors and experts from the regional inspectorates. This group of respondents is more positive on the quality of the system but still more than the 50% of them believe that the system needs profound reforming. University students constitute alone the third group of respondents, being 91.7 % of them dissatisfied with the quality of future teachers' preparation.

From the results, it becomes evident that those who work in the field and are highly involved in the teaching-learning practice, such as teachers and inspectors, have a mixed opinion. Contrary, those who are more implicated in the institutional framework of the education process rather than the every day practice, such as ministry officials and NGO members, have a more negative opinion. Students themselves are in the middle of the two extremes acknowledging both strengths and weaknesses of the pre-service teachers' training system, as reflects in the daily work of their teachers. One would expect that the members of teachers' unions and teachers themselves would share the same opinion. It is evident though that the former see the education from an institutional and political point of view, whether the latter from a professional angle.

FIGURE 12.1 FINDINGS ON THE QUALITY OF PRE-SERVICE TEACHER TRAINING

Do you believe that the current pre-service education prepares successfully the Bulgarian teachers in order to acquire the appropriate competences to teach in the knowledge based society of the 21st century?



Source: Author

Endorsing our survey's findings with literature review on the evaluation of teachers' training system in Bulgaria, a serious problem the Bulgarian teaching force is facing today with direct consequences to the quality of the teachers' training system, is the lack of attractiveness and motivation to the teaching profession (OECD, 2004b). In many cases, students decide to take up courses in pedagogy just as a precaution, without actually planning to become teachers in their life career. Even when students are successful in teaching practice, due to the inadequate salaries and other unattractive aspects of the teaching career at present, may choose careers other than teaching.

Because of this, university classes are overcrowded cutting across the small-group and tutorial work, which can be so important in pre-service education. Moreover, it is a sheer loss of time and effort of the teaching staff when many do not enter, or do not stay in teaching. This loss of able young graduates deprives the profession of the "new blood" which is so vital at present.

For these reasons, there is a generalized consideration that courses in pedagogy are not prestigious with students not paying enough attention to them, but rather trying to meet the requirements just formally. Many even complain that teaching practice takes too much of their time, while in reality, more time spent practicing in real settings is essential. Universities also offer pedagogy as bachelor degree but this specialty is not very popular and entry requirements are considered low in respect to the others, which ultimately has a negative impact on the quality of education (OECD, 2004b).

Another finding of our research that can explain the dissatisfaction of the informants with the quality of pre-service training is the compartmentalization of the pre-service teacher education institutions. Their engagement with in-service education is only occasional and incidental, rather than an integrated one (OECD, 2004b). Some courses are provided for the upgrading of teacher qualifications, but the involvement with serving teachers or with in-service institutes seems small. Some teacher education staff has been involved with curriculum changes being promoted by the MES; however, from discussion with MES officials and with teacher educators, we concluded that relationships are not always harmonious.

Clearly, the existing pre-service arrangements are in need of serious review. Without a satisfactory initial formation, it is pointless to expect the teaching force to be of high quality and to be in a position to apply innovative pedagogies, to deliver a modernized content and to reach the needs of the individual students. Moreover, in a time when Bulgaria is modernizing its school system, the appropriate preparation of the future teachers is indispensable, if reforms are to be successful.

The need for further actions for updating teachers' training and boosting its practical orientation was recognized by the policy-makers interviewed. 28/30 ministry officials believe that it is necessary to introduce on wider scale teachers' training for acquiring skills such as on information and communication technologies which are being introduced on a large scale to the school and the management system of education.

12.2 IN-SERVICE TEACHERS' TRAINING

As it is well known, teachers' adaptability and innovation regarding the new curriculum and pedagogy is imperative. Teachers not only need to be informed on the changes implemented in the curriculum, but also to be adequately trained in order to delivery it successfully. Curriculum reform poses great challenges to the capacity and motivation of teachers since it changes their daily functions and role. To this respect, teachers need enlightened support and continuing training in order to develop and/or acquired the new competences required under the new curriculum framework.

Within the sphere of examining the major possible policy changes made to accompany the curriculum reform in terms of continuing teacher education at secondary level, we attempt to examine the following issues:

- the reforms in the curriculum and the provision of in-service training programs; and
- the degree to which the current in-service teachers' training system prepares successfully the Bulgarian teachers to acquire the appropriate competences to teach in the knowledge based society of the 21st century.

The following sections are structured accordingly.

12.2.1 In-service teacher training provision and recent reforms

As the pre-service education for teachers in Bulgaria, the in-service teachers' training is part of the higher education system and is regulated by the Higher Education Act (1995). The continuous education is based on the qualification model contained in Ordinance No. 5 of the Ministry of Education and Science (MES) of 1996, according to which, teachers' professional development is not obligatory in Bulgaria but it is increasingly being viewed as a professional responsibility. The ordinance establishes five vocational-qualification degrees with salary differentiation, which might be achieved at two-year intervals. Different units realize the training for these degrees: universities, institutes, regional inspectorates of

the MES, etc. Only the institutes though located in Sofia, Varna and Stara Zagora provide recognized training. The three institutes are respectively associated with the Sofia, Shoumen and the Trakian Universities, but they have juridical autonomy.

The continuous education of teachers might as well involve specific topics related to the local needs of the school and the teachers or linked to reforms implemented in the school system, such as the introduction of new National Education Standards, new curriculum requirements, measurement and external evaluation of students' achievement, introduction of information technologies, etc.

The three recognized institutes for in-service training provide both free and paid courses. Programmes being approved by the MES within the parameters of the qualification system or developed at the request of the MES for supporting teachers at new developments are free of charge. Paid courses are usually those attended at the individual initiative of the teachers for their personal development. The institutes offer two types of free courses: courses in curricular subjects and courses in pedagogy, psychology and management (see annex 17 courses in offer at the in-service teachers' training institute in Sofia).

The courses are planned in relation to priorities expressed by the Ministry, requests from the inspectorate, requests from schools and the feedback received from the participants in the courses of the previous year. The local education authorities through the regional inspectorate vet course proposals. Brochures are then prepared and distributed to schools. On receipt of candidates' applications, the programmes are finalized. It is usually necessary to have a minimum of 6-8 applicants to mount a course, while the preferred maximum is 25 participants (Eurydice, 2003d).

The funding for teachers' in-service development is distributed through the universities. Universities decide about the terms of financing and the arrangements vary between the institutions. The institutes do not receive enough money for equipment, as most of the equipment (computer laboratories, copying machines, etc.) is funded through international projects (Tempus, Francophonía, etc.). The MES does not have any special funds for teachers' professional development, and thus, it has few mechanisms to influence its content and quality.

Professional development programmes are also provided by other organizations such as teachers' associations, trade unions, NGOs, training centers established by international programmes, such as the EC-Phare, Tempus, British Council, etc. University faculties are also providing courses in certain areas, depending on teachers' personal needs and interests. These courses are voluntary and the obtained certificates are not officially recognized and cannot be used to promote teachers' careers. At the moment, there is no system of programme evaluation and accreditation for such courses (Eurydice, 2003d).

According to a pilot survey conducted within the parameters of the project "Teacher Qualification Models for Education Reform Implementation" addressed to 304 teachers coming from different types of schools and having a wide range of professional experience, teachers attend institute courses for two main reasons: to achieve attestation and accreditation to advance their careers, and to upgrade their skills and keep abreast of new curricular and teaching developments. Based on the findings of this survey encompassing the period from January to 2004 to January 2005 (Balkan Society for Pedagogy and Education, 2006), the need of professional skills improvement is indicated as the principle motive for attending in-service training (50.32% of the interviewees) followed by the career development (40.64% of the interviewees). Only a 7.74% of the interviewees associated in-service training to higher remuneration.

While these results give us at first place the impression that teachers in Bulgaria do not attribute importance in salary increases arising from progression in the qualification levels, we should bear in mind that attending training for career advancement (responded by the 40.64%), also implies increases in salary. Thus, we could conclude that teachers in Bulgaria participate in continuous training motivated equally for their personal development as well as for better working and salary conditions.

The professional advancement of the teaching staff can be horizontal or vertical (Eurydice, 2003d):

The horizontal advancement is connected to increasing the professional skills, experience and qualification, while keeping the same job position – it is expressed in the participation in different forms of professional qualification and improvement, acquiring professional

qualification degrees, specializing in the country and abroad, taking on additional duties and functions within the school organization, as well as through self-preparation and self-improvement.

With the increasing of the work experience of the teachers, their remuneration also increases. For teachers, who lack the necessary educational level or teaching qualifications, the horizontal advancement is expressed in acquiring the respective forms of training in the higher education system. Transferring the teacher to a more prestigious and established school organization can also be considered as horizontal advancement.

At present⁹¹, the teaching career is structured on a five-grade promotional path. Teachers wishing to progress through the grades need to meet the following requirements:

- 5th level (lowest) – at least 4 years teaching experience till the date of application, and an oral exam. It could be granted to teachers who have long-term teaching experience and whose students had achieved good results at national and international competitions.
- 4th level can be acquired by the candidates who have already been granted the 5th one and have passed successfully a written exam in a certain educational problem.
- 3rd level is granted to teachers who have acquired the 4th one and have completed successfully a 1-year-long specialization course in the area of education (pedagogical specialization) consisting of a minimum of 200 academic hours, 50% of these in the areas of education, psychology, methodology of teaching/learning or school management.
- 2nd level is granted to teachers who have acquired the 3rd one and have presented a research project.

⁹¹ In the course of 2007, this 5 level qualification system is under revision by the MES and a new teacher qualification/career development plan based on a performance-based salary incentive for teachers is due to be implemented in the beginning of 2008/09 school year. The new teacher training and career development strategy should be in line with the European Qualifications Framework (European Commission, 2006). In the beginning of 2007, this scheme was tried out in 25 schools in the country with another group of 25 schools voluntarily participating in the experiment. The MES have 13.1 MBGN for developing this activity in the budget (World Bank, 2007a).

- 1st level is granted to teachers who have acquired the 2nd one, have successfully presented a research project, and have publications in the area of education-related research (OECD, 2004a).

The achievement of the different grades of the teaching career is assessed by a commission assigned by an order of the Director of an institute and headed by a professor or associated professor in the corresponding area. This obviously allows a great power to the Director of the institute, while the criteria on which they are based for the selection of the commission are not known.

Vertical advancement is expressed in moving to a position with higher requirements in the hierarchical structure of the educational system. After acquiring a certain work experience / 3-5-7 years/ depending on the requirements for the respective managerial position, the teachers, who have the necessary educational level and qualification, may apply for advancement. At a school level, the managerial positions are principal, deputy principal, at a regional level - experts in the respective subjects, organizational experts, heads of Regional Inspectorates on education, at a national level - specialized administration at the Ministry of Education and Science, heads of departments, directors offices and so on. Taking up most of the managerial positions in the public education system is realized on the basis of a successfully held competition.

Modernizing in-service teachers' training was included in the *Education Modernization Project* of the Ministry and an investment of about USD 3.5 million was allocated by the World Bank. According to this project, a new demand-driven system of in-service teacher training should be established to respond more quickly to newly emerging training needs. The new system should provide training to support both the implementation of the new content of education, as well as the adoption of new teaching methods. Activities under this component included: development of a demand-driven system of in-service teacher training and training on new curricula by establishing a cascade teacher training system. This would create conditions for decentralizing in-service teacher training and reaching more beneficiaries.

To bring about these changes, a new Directorate for Teachers' Training was established in the MES with 12 experts and technical assistance. The new institution contributed to put in practice all the decisions and measures which were already adopted but remained only in paper for many years.

A total of 150 trainers were trained who then trained 18 800 school principals and teachers. Participants at the seminars were asked to fill in questionnaires so that the training could be evaluated. National consultants have analyzed the information in these questionnaires and issued a report according to which the seminars as a whole were considered useful (ASIARP, 2003a, p.27).

However, the training of teachers on the new curriculum and the new national education standards took place for the first time on 20 September 2003, after 4 years of delay (since 1999, when the new curriculum has been introduced) and lasted until the 30th of October of the same year. These were only two-day seminars providing a total of 16 hours of general training addressed to all teachers for all education levels.

One of the priorities of the new Directorate for Teachers' Training in MES is the improvement of foreign languages training. To do so, they collaborate with the National Francophonie Institute, the German Institute and the British Council. Among the other functions of the new Directorate is also to train teachers to teach different subjects of the one they are specialized in, to reduce the big excess of teachers in some specific subjects⁹².

In 2004, a pilot project carried out by Paideia foundation in the region Kardjali for preparing teachers qualifications and assessing school environment. The first component of the project aimed to identify what are the skills that teachers have and whether the qualification level they have reflect a real capacity. This information was gathered by teachers themselves and by the regional inspectorate. A public debate took place with the local authorities, teachers and local business representatives during which each of these stakeholders presented their own vision (www.paideiafoundation.org).

⁹² This information was facilitated to us in September 2004 by the Head of the Directorate for Teachers' Training at the Ministry of Education and Science in Sofia.

This project aimed to support the main priority of the newly (July 2003) established division within the MES: “Regulation for teachers’ qualifications” to develop the National Standards for Teachers. The new Division as of 2004 was consisting of 5 members who are all former teachers and professionals with background on pedagogy and economy.

In September 2004, they published the instructions No 2. This is a temporary regulation until the national standards for teachers are adopted. It regulates and specifies the entry requirements for the teaching profession: the education candidates should have acquired and the degrees they should possess those willing to become teachers in any level of education.

The National Standards for Teachers have been developed but they have not been adopted yet. The whole process for the preparation of the new National Standards for Teachers took seven months, from February to August 2004. The members of the new division were studying for two months the European practice from 10 different countries; they have analyzed the whole legislation framework for teachers in Bulgaria since 1973 and they proposed three frameworks, which they submitted to the Commission for teachers’ standards⁹³ in order to choose the final one. The designed standards have four components:

- a) general provision;
- b) pre-service training and needed competences;
- c) in-service training for career development; and,
- d) principles and requirements for the teaching profession. The standards include explicit competences on civic education, foreign languages and ICT⁹⁴.

A national conference took place in June 2004 in Sofia on the “Quality of learning and the role of the Bulgarian teacher in the European education environment”. The comments and proposals made in the Teacher Training Section reflected the problems that have troubled the teachers’ community in the last few years (see Box 12.1 Policy recommendations for the improvements of teachers’ training)⁹⁵.

⁹³ This commission consists of university professors and experts from the MES.

⁹⁴ The former Deputy Minister for School Education (acting from 1998 to 2000) facilitated this information to us in September 2004.

⁹⁵ The Head of the Teachers’ Training Directorate in MES facilitated this information to us in September 2004.

12.2.2 Quality of in-service teacher training: interviewees' opinions

To measure the degree of satisfaction of the different actors involved in the educational process on the in-service teachers' training system, we have asked the different groups of informants to express their opinion on the quality of in-service teachers' training provision. In particular, we have asked 18 educators (teachers, university professors, trainers), 50 administrators (ministry officials, inspectors, school directors, directors of teachers syndicates) and 28 informants from the civil society (students, parents, NGOs, publishing houses) to specify the quality in terms of three issues of interest (see chapter 10.2.2 Elements under examination):

- a) the relevance of curricula and training models;
- b) the possibilities for career advancement;
- c) the openness and accessibility to training.

The opinion of these actors is significant for our study not only because of the representation of our sample of research but also because their degree of satisfaction may determine the level of implication of these actors in the successful implementation of the curriculum reform. In continuation, we present the finding of our survey for each of the above-mentioned three topics:

a) Relevance of curricula and training models

We have already explained in the previous subchapter that in-service teachers' training is offered both in a regular basis for personal and professional development, as well as in an *ad hoc* basis for training teachers on new policy developments. In this chapter, we will examine the opinion the different stakeholders have on the quality of both types of training in offer.

As regards the regular in-service training, before the University became autonomous the courses to be offered were a completely centralized government decision. Since Universities gained their autonomy in 1995, every year, professors of each department of the University propose to the three in-service training institutes specific courses which reflect as much as possible the new curriculum implemented in the school system. A systematic mechanism

does not exist for needs assessment and forecasting, just the training institutes disseminate questionnaires to teachers for assessing their personal needs. The Director and the staff of the in-service training institute in Sofia believe that this procedure is not always efficient as “*often teachers are not willing to fill in the questionnaires and give their feedback*” (Trainer in the in-service teachers’ training institute in Sofia, Former Deputy Minister for Education).

While there are advantages in being associated with the universities, there is also a sense of the institutes being marginalized and subordinate to the universities’ activities. The nature of the work of the institutes is different, regarding *clientèle* content and process, but they are often expected to comply with the rules of the university, which may not be appropriate (OECD, 2004a).

From our personal interviews with the Director of the in-service training institute in Sofia, 3 secondary education teachers and 10 university professors, we concluded that the link between pre-service and in-service training is quite loose. This may have a negative impact on the quality of the courses and the continuity of the training in offer. It is worthy mentioning the information given by the former Deputy Minister for Education who is currently a trainer in the above-mentioned institution. His opinion is significant as the interviewed university professors also share it:

“Despite the fact that the teacher’s training institute is part of the university, there is no close collaboration between the two institutes. Only when teachers form the university don’t have enough hours of teaching, they choose to teach at the institute in order to cover their compulsory hours” (Trainer in Teachers’ training institute of Sofia, and former Deputy Minister for Education).

As far as regards the quality of the courses offered, 50% of the informants claimed that these are partial and unilateral. All the educators interviewed were dissatisfied with the structure of the qualification levels. They claimed that the transition from one qualification degree to another does not require multi-profile training but it is rather focused on the theory and practice of teaching the particular subject in which the teacher specializes. The 2 experts in education dealing with research on education, the 4 members of the Syndicate of

Bulgarian Teachers in Sofia, and the 3 secondary education teachers teaching in both comprehensive and elite profile schools interviewed have all agreed that *“the training courses are too basic and are not designed to provide teachers with broader knowledge and skills”*.

There was a unanimous agreement though that the provision of in-service training is progressively increasing in quality. Indeed, based on the curriculum facilitated by the In-service training institute in Sofia, one can see that new courses are being developed progressively to support new policy developments in the education system of Bulgaria, as well as to catch up with new European trends, giving emphasis on new teaching approaches, ICT applied in pedagogy and interactive teaching-learning processes. Examples of such courses are: New education technologies in teaching Bulgarian language and literature; Research activities for teachers of English language; Organizational skills and professional capacity of English language teachers; Integrative approaches to English language education content; Intercultural education for foreign language teachers, etc. (see Annex 17).

A clear impediment though to increase the relevance and the quality of the courses is the inadequate funding of the institutes (OECD, 2004a). Based on the opinion of the members of the in-service training institute in Sofia and the other educators interviewed, the institutes are not equipped adequately to carry out effectively these courses. It is worth mentioning the point made by the Head of this centre:

“The MES decided to finance and give computers to schools but not to teachers’ training institutes. How do we suppose then to train teachers to work with new technologies? The budget expected to cover capital investment, scientific research in education and in-service training for teachers and school directors is not sufficient” (Head of in-service teachers’ training institute in Sofia).

According to the current “National Education Act Implementing Regulations”, funds for in-service teacher training are allocated in the government budget only if new national education requirements are introduced or the existing ones are changed.

The opinions differed radically among the people interviewed on the quality of the training provided to teachers in order to prepare them for the new curriculum implemented in secondary duration since 1999.

According to the Head and the four members of the Bulgarian Teachers Syndicate in Sofia:

“teachers have been satisfied with the training seminars that have been organized, they have been fully informed about the changes in the educational system and the new attainment targets and they have not faced any problem with the implementation of the new curriculum” (Head of Teachers’ Union in Sofia).

However, the members of the SOROS foundation, who have been strongly involved in the preparation of these seminars, have a different opinion:

“20% of teachers did not even know that exist new National Education Standards, and as far as it concerns the problems that teachers have faced on the implementation of the new curriculum, the list is too long” (NGO expert).

Ministry officials explained that they faced serious difficulties for the organization and management of this training. Among these challenges, many errors and discrepancies have been committed. The most common problems stated by the 30 ministry officials, the Deputy Minister on power at the time of our visit, two former Deputy Ministers who contributed in the design and implementation of the curriculum reform, two education experts and seven secondary education teachers⁹⁶ interviewed are:

- teachers’ trainers haven’t been well trained and informed in advance in order to provide adequate training;
- the training was delayed significantly as it took place four years after the new school curriculum was introduced;

⁹⁶ The four members of the Bulgarian Teachers Syndicate in Sofia are also included as they are also teachers in secondary schools.

- most seminars were held in the big cities rather than the rural areas or isolated areas in the country, causing technical difficulties to many teachers who wanted to attend. This led to the unequal attendance at seminars and unequal opportunities to improve teachers' training skills.

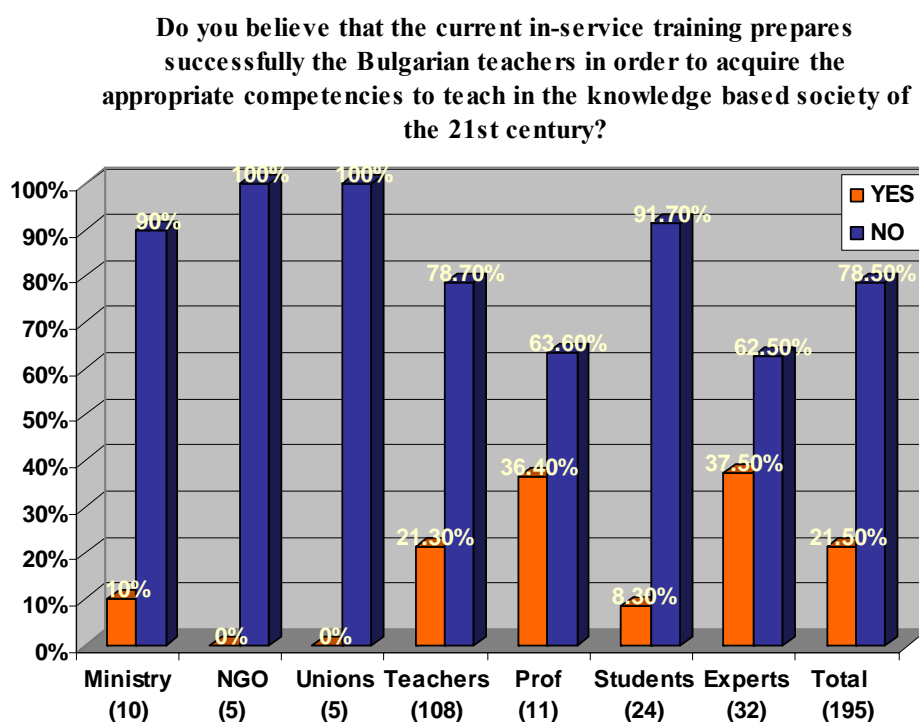
According to these informants, the lack of timely and appropriate provision of teachers' training caused a lot of confusion and prevented a unified approach of delivering the new educational content. This obviously may have created a gap between the intended and the implemented curriculum.

To further expand our sample of research on the opinion the different actors concerned have on the quality of in-service teachers' training and endorse it with statistically significant results, we have asked 201 informants to tell us whether they believe that the existing system for continuous training of teachers prepares successfully the Bulgarian secondary education teachers to acquire the needed knowledge, skills and competences.

We have received in total 195 answers from which it results that informants in their majority, the 78.5%, believe that the in-service training system is not adequately organized in order to equip effectively teachers for meeting the challenges and needs arising from the knowledge-based society of the 21st century (see figure 12.2).

The findings allow us to identify three groups of opinions. The first one comprising the members of NGOs and Teachers' Unions is the most negative among the responding groups. Secondary education teachers, university professors and inspectors from the regional inspectorates in Bulgaria acknowledge both the strengths and weaknesses of the system, even though more than the 50% of them find the system inappropriate. It is interesting to find out convergence in the opinions of the two extremes in the scale of actors involved in the education system: the ministry officials and the students. In other words, those who design the education and those who receive it are slightly more positive from NGOs and Teachers' Unions members as far as concerns the quality of in-service teachers' training.

FIGURE 12.2 FINDINGS ON THE QUALITY OF IN-SERVICE TEACHER TRAINING



Source: Author

b) Possibilities for career advancement

We have seen in the previous chapter that career advancement for the teaching profession is based on a 5-level degree system, which is currently under revision. According to this system, those who have the highest qualification degree receive only 33 BGN (€ 15.33⁹⁷) more than they receive their colleagues who have the lowest degree (OECD, 2004a)⁹⁸.

⁹⁷ Based on rate exchange given by <http://www.xe.com/ucc/> as of 31 May 2007.

⁹⁸ The basic salary for the position of a teacher is determined based on the horarium, the personal qualification (the availability of a qualification degree reflects on the remuneration), the length of experience and the coefficient on the minimum monthly salary in the country. There are no other ranks for teachers and no other factors that influence teachers' salary. If the minimum horarium is not reached, the basic salary of a teacher is decreased but not more by five hours weekly or 180 hours a year (OECD, 2004a).

Teachers interviewed expressed their dissatisfaction to this small increase in the remuneration and complained that the system does not provide them with real financial incentives in order to improve their capacity and skills by undergoing in-service training.

“Teachers opt for a better qualification level to not risk losing their job and not for a better career development” (Head of in-service teachers’ training institute in Sofia).

Based on the opinion of the majority of teachers interviewed, the qualification system is not well designed. The lowest qualification degree can be obtained in the very beginning of a teacher’s career -after two semesters of training and upon presentation of a developed lesson plan- something that a teacher should be able to do before even entering to a classroom for the first time. All five-qualification degrees can be obtained in no less than 15 years.

It is interesting to see that both educators as ministry officials agree that the qualification system is not effective, certain proposals however for its reform did not focus on the right direction. For example, the Head of Teachers’ Union in Sofia made in 2004 a proposal to the MES to reduce even more the overall time needed for the acquisition of all five-qualification levels. This means that once teachers receive the highest qualification level, they will not receive further training until they retire. In 2007 though, a more systematic attempt is being made for the revision of this system to promote a performance-based salary incentive for teachers. By 2008/09 school year, the government aims to implement a national system for evaluating teachers’ performance resulting on salary increases for those positively performed (see chapter 12.2.1).

c) access to teachers' training

From the interviews we held with 18 educators and 50 administrators (including policy-makers, school directors and inspectors), we concluded that access to teacher training is rather limited in Bulgaria. Teachers have to use their paid leave to attend courses and must pay out of their own pockets for tuition fees, transportation, accommodation and other costs throughout the duration of the course. There are many the cases also that school Directors do not allow teachers to attend training. This happens mainly for three reasons: there are no teachers to replace them during their leave; they do not have a good relationship with the Directors; or the inspectorate does not agree. This often forces teachers to take sickness leave for attending training courses⁹⁹.

From the same source we have been informed that due to the lack of financial support to students, the number of teachers taking in-service courses has dropped the last few years by almost 50%. The majority of the courses are free and the institutes are offering inexpensive accommodation, but teachers still have to pay for their travel expenses. As teachers cannot easily get paid leave or find substitutes, they hardly participate in such courses. For instance, none of the teachers interviewed from the five schools we have visited had taken part in in-service courses since the curriculum reform initiated in 1999.

It is obvious from what we have discussed up to now that there needs to be a more coherent national policy on in-service training, more co-ordination of effort, and better funding (see Box 12.1 for policy recommendations to improve teachers' training).

⁹⁹ Information collected during our personal interview with the Head of in-service teachers' training institute in Sofia in September 2004.

BOX 12.1 POLICY RECOMMENDATIONS FOR IMPROVING TEACHERS' TRAINING

The following recommendations emerged as a result of the debate held during the National conference held in June 2004 in Sofia on the "Quality of learning and the role of the Bulgarian teacher in the European education environment".

The need to radically change the existing regulatory framework for teacher training and the inadequacy of the current Regulation on In-service Teacher Training and the Attainment of Professional Qualification Degrees.

1. Adopt as soon as possible National Education Standards on Teacher Competence and Qualification, to provide the legal grounds for developing other regulations, related to the teaching profession.
2. Draft a regulation to introduce a new in-service teacher training system, which would cover the different types of training, required for the professional and career development of teachers.
3. Reduce the number of existing professional qualification degrees and establish such conditions for in-service teacher training that would motivate teachers to improve their competences and skills.
4. Create conditions and incentives for continuing education that would encourage teachers to be more proactive, creative and productive.
5. Conduct regular performance assessment and attestation. Assess students' performance.
6. Establish a link between qualification and salary.
7. Ensure that higher requirements to teachers would lead to improved economic status.
8. Introduce teacher ranks with different workload and different functions for each level.
9. Strengthen the link between schools and teacher training institutes.
10. Identify the universities, which train future teachers, given that the teaching profession is a regulated profession under the Higher Education Act.

Resolve the problem with the existing mechanism for financing in-service teacher training.

1. Adopt sound amendments to the National Education Act and its Implementing Regulations.
2. Delegate budgets for the different types of training received by teachers and school directors.
3. Attract external funding from accession and pre-accession funds, foundations and other NGOs.

Offer in-service teacher training at school, regional, and national levels.

1. Introduce in the relevant regulations a certain number of compulsory training classes per year for all teaching staff as part of their overall workload.
2. Use the training packages developed under the in-service teacher training component of the World Bank Project to conduct training at regional and school level. This could be done by the Regional Support Groups that exist in all Regional Inspectorates on Education.
3. Allow teachers and school directors to choose upon mutual agreement when to conduct training.
4. Set up standards for the different types of in-service teacher training to ensure quality of the training services provided.
5. Give priority in the provision of in-service teacher training to universities and teacher training departments.
6. Give NGOs the possibility to contribute to this effort by providing teacher training in cooperation with educational institutions.

Provide information and communication technologies in education and communicating information to teachers

1. Include the introduction of ICT in education among the priorities of the MES in the sphere of in-service teacher training.
2. Organize basic computer literacy courses for all teachers at school or at regional level.
3. Modernize existing equipment and material facilities for education.
4. Create conditions for communicating information across the education system through printed and electronic releases publicizing amended or new regulations, new developments in the teaching profession, training opportunities, etc.

Source: Official translation from the conference's outcomes for the purpose of this study

12.3 TEACHERS' QUALIFICATIONS AND COMPETENCES

“Teaching beyond the knowledge economy entails developing the values and emotions of young people’s character, emphasizing emotional as well as cognitive learning, building commitments to group life and not just short-term teamwork; and cultivating a cosmopolitan identity that shows tolerance for race and gender differences” (Hargreaves, A.. 2003, p.4).

We have already referred to the fact that the democratization of the educational system and the modernization of the curriculum, demands the development of new competences and skills for teachers. In order to identify which are these competences and qualifications that secondary education teachers should have or acquire, we gathered the opinion of the informants on the following issues:

- the competences that different stakeholders and the civil society consider as directly important for teachers to teach under the new curriculum and prepare students for the knowledge economy;
- the degree to which Bulgarian teachers of secondary schools are adequately qualified and possess most of the directly important competences;
- the domain of teaching competences in which Bulgarian teachers are lacking training: *teaching domain competences, school domain competences or professional domain competences*;
- the degree to which the National Qualification Standards for Teachers, currently under preparation, include most of the directly important competences.

Before we present the findings of our survey, it is important to see what the entry requirements to the teaching profession in Bulgaria are and what the current qualifications profile of secondary education teachers is. This will enable us to better contextualize and interpret the results of our study.

12.3.1 Entry requirements for teaching profession

The requirements towards teachers' education and training are regulated by the legislation on education. The National Education Act, the Regulation for its implementation and the instruction for Appointment of Teachers and Educators regulate the terms and conditions for appointing pedagogic personnel. The Regulation on Unified State Requirements for Obtaining Professional Qualification of Teachers defines the conditions, the order and the minimum educational level for teachers, as well as the criteria for their assessment. The legal requirements for acquiring teacher's qualification were approved in 1997 (MES, 1997a).

The functions of the teachers and their competence in the educational process are described in Teacher's Job Description. This is an especially important document, specifying the working conditions and the duties of a teacher. The job description is the basis of the teacher's contract and for the regulation of the labor relations between the teacher and his/her employer. According to the specifics of the school, the job description may include other functions and requirements, if they do not contradict any regulations in place.

Teacher's Job Description emphasizes on (Eurydice, 2003d):

- the requirements to the teacher's pedagogic and special scientific training;
- the functions and roles of the teacher, in connection with mastering and building knowledge, skills and relations of the given area/subject;
- the functions and roles of the teacher in connection with the forming of moral, social and personal knowledge, skills, relations and values of students.

In concrete, it specifies the:

- scientific education and training on the subjects taught;
- comprehensive knowledge of the required academic level of the subjects to teach;
- sustainable level of specialized scientific training and education for the relevant subject he/she is teaching by the moment of appointment and in the course of work, maintained through following the novelties in the subject;

- comprehensive knowledge of the applied and technological aspects of science to which the subject to be taught belong;
- pedagogic and methods training;
- ability to identify the level, competence, specifics and preferences in the style of learning of a given audience and of the individual students;
- ability to identify educational and instructive needs;
- ability to define in observable and measurable form the educational goals with variable degree of commonness (at the level of syllabus, subject section or single lesson);
- mastering of different methods to plan the educational process and to prepare different educational material and ability to make connections between the goals of the educational process and the results achieved;
- comprehensive knowledge on educational strategies, methods and practices for teaching, training, studying and motivating students;
- ability to assess the quality and the appropriateness of the educational and teaching aids, developed to meet different educational needs;
- mastering of various forms and tools of control and assessment of pupils' achievements and of the results of the education.

Beyond these competences included currently in the job description of teachers, new National Qualification Standards are now under preparation due to be introduced in 2008. To complement our study with the most recent developments, we have asked the responsible ministry staff from the Directorate of Teachers' Training in MES to indicate those competences to be included in the National Standards for Teachers. Based on the information received, secondary education teachers should be able to:

- design teaching-learning situations for the subject-matter to be learned, and doing so in function of the students and of the development of competences included in the curriculum;
- establish a learning orientation by starting lessons and activities with advance organizers or previews;

- give students opportunity to learn, dedicating most of the available time to curriculum activities;
- question to engage students in sustained discourse structured around powerful ideas;
- provide correct, substantive and timely feedback to students;
- adequate monitoring of student understanding;
- evaluate learning progress and the degree of acquisition of students' competences in the subject matter to be learned;
- plan, organize, and supervise the way the group-class works, in order to help students learning and socialization processes;
- adopt teaching to student diversity;
- help the social integration of students with learning or behavioral difficulties;
- integrate the technologies of information and communication into the preparation and development of teaching-learning activities, classroom management, and professional development;
- communicate clearly and correctly, both oral and written, in the different contexts related with the teaching profession;
- co-operate with the school staff, with parents, and with the various social agents to achieve the school's educational targets;
- work in co-operation with the other members of the teaching staff in tasks enabling the development and evaluation of the explicit competences of the training plan, and doing so in function of the students;
- act critically as a professional, interpreting the objects of knowledge or culture in performing one's functions;
- become involved in an individual and collective project of professional development;
- act ethically and responsibly in the performance of functions;
- avoid all forms of discrimination by students, parents, and colleagues;
- make judicious use of the legal and authorized framework governing the profession;
- know about national educational policies related to the curriculum, contractual obligations of teachers and quality management.

From the above-mentioned list of competences, it becomes evident the shift towards a bigger gamma of knowledge, skills and competences expected from teachers. While before, the major weight was given on the subject matter knowledge of the teachers, with the forthcoming National Qualification Standards, new competences referring to teaching, school and professional spheres are required. For the first time, is being emphasis on competences such as to know how to use ICT and to establish a democratic conduct in classroom.

Once we have seen the legal framework and entry requirements to the teaching profession, in continuation, we will examine the qualification profile that active teachers have today in secondary schools.

12.3.2 Teachers' profile and qualifications in secondary education

Under the ultimate goal to examine what competences the different stakeholders and the civil society expect from teachers to have, it is significant for our study to know the current profile of the teaching force. To this end, we will look at the profile of teachers in terms of the level of initial education completed, their age, and the competences they display in relation to ICT literacy and foreign languages.

These three parameters are relevant to our study for two main reasons. First, international studies highlight that people with higher level of education receive more continuing training (Cedefop, 2007). Therefore, the entry level of education of teachers in Bulgarian schools is determinant for their further formation. Second, information and communication technologies and foreign languages are included among the 8 key competences established

by the European Commission¹⁰⁰ as necessary for living and working in the knowledge-based society of the 21st century (European Commission, 2005).

Based on national data retrieved from the Eurybase, the total number of teaching staff for all types of schools in the country for the period 2002/03 is 82 392, of which teachers and vice principals engaged with teaching classes were 79 036 and only teachers 77 114 (Eurydice, 2003d). From those, the majority is women (62 324 teachers) who are teaching in general education schools (57 427 teachers) at upper secondary education level (31 156 teachers).

An important advantage for the teaching force in Bulgaria is the rising educational level of Bulgarian teachers and other education staff. Of the total number of the pedagogical staff of all schools in the country in 2002/03, the majority of them have a higher education degree. In concrete, the statistics for the educational background of teachers show that 83% of them have university degrees, 15.8% have college degrees and 1.2% has only high school diplomas. These figures draw a positive picture, as over the past five years, there has been a steady tendency for the number of teachers with university degree to increase by almost 8% (National Institute of Statistics, 2005).

TABLE 12.1 DISTRIBUTION OF TEACHING STAFF BASED ON PROFESSIONAL QUALIFICATION DEGREE

No of teachers with Professional Qualification degree	1st	2 nd	3 rd	4th	5th	Academic degree	Total
	1223	13090	1648	601	2539	252	19101

Source: Author, elaborated data found in Eurydice, 2003d www.eurydice.org

¹⁰⁰ The 8 key competences for lifelong learning recommended by the European Parliament and of the Council are: 1) communication in the mother tongue; 2) communication in foreign languages; 3) mathematical competence and basic competence in science and technology; 4) digital competence; 5) learning to learn; 6) interpersonal, intercultural and social competences, and civic competence; 7) entrepreneurship; 8) cultural expression (European Commission, 2005 COM(2005)548 final).

TABLE 12.2 DISTRIBUTION OF TEACHING STAFF BASED ON COMPLETED DEGREE OF EDUCATION

Degree of education	Total teaching staff *	Total teachers
Master of Science or Bachelor	68201	62998
Specialist	13226	13151
Secondary education	965	965

Source: Author, elaborated data found in Eurydice, 2003d www.eurydice.org

*NB included educational staff responsible for support and guidance.

In terms of age, the largest group (36.5%) is the teachers between 40 and 49 years old. Together with those aged between 30 and 39 years, they form the 67% of the teaching staff in Bulgarian secondary education. Young teachers below 30 were 11.5% in school year 2002/03 (Eurydice, 2003d). Unfortunately, over the last few years this number is being constantly decreased. This may have a negative impact on the successful implementation of the curriculum reform, bearing in mind that young teachers are those who bring new technologies and new teaching and methodological approaches to schools; they are those who are not ideologically influenced from the old communist system being more open to new ideas and democratic principles. In addition, due to their youth, they have more possibilities for training, retraining and career advancement.

National overviews of the education system in Bulgaria (Eurydice, 2003d) explain that there are many reasons for this decrease in the number of young people in the teaching profession. First, young people tend to avoid the teaching profession not only because of the low salaries, but also because of the low social status and general lack of respect towards teachers. On the other hand, because of downsizing the number of schools, teaching positions are constantly decreasing and young teachers find it hard to get a job. Finally, because of poor human resource planning, some subjects such as *Foreign languages* and

ICT suffer from a severe shortage of qualified teaching staff, while in others, there is a redundancy.

TABLE 12.3 DISTRIBUTION OF TEACHERS BY AGE GROUP

Age group	teaching staff *	teachers
25	1787	1782
25 – 29 years	7693	7597
30 – 34 years	11446	11058
35 – 39 years	12964	12201
40 – 44 years	14926	13730
45 – 49 years	14851	13643
50 – 54 years	11660	10668
55 – 59 years	5735	5236
60 – 64 years	1224	1102
65 and over	106	97
Total	82392	77114

Source: Author, elaborated data found in Eurydice, 2003 www.eurydice.org

*NB included educational staff responsible for support and guidance.

Indeed, computer skills and foreign language proficiency are among the weakest sides of Bulgarian teachers' competences. In school year 2000/01, only 10% of all teachers were qualified in foreign languages, while only 6% possessed computer skills (Eurydice, 2003d). This is worrying, especially when foreign languages and ICT are a priority for all modern education systems (OECD, 2004a).

Thus, while the availability of qualified teaching staff for subjects of high demand is extremely important for the effective implementation of new curricula and methods of teaching, today, the lack of adequate human resources is often cited as one of the key problems of secondary education in Bulgaria. The Minister for Education, Dr. Igor Damianov highlighted this problem in his speech under the topic: “The challenges to secondary education in the Republic of Bulgaria”, during the Seminar “Reform in Secondary Education in the Republic of Bulgaria”, organized by the MES and the World Bank in January 31, 2005 in Sofia, Bulgaria:

“One of the most essential areas, which require urgent intervention, is teacher training. A mechanism needs to be developed to estimate and plan training needs within the secondary education system. A regulatory framework needs to be created to establish a modern system for in-service training services. The current lack of enough qualified teachers, especially in Foreign languages, and the incapacity of all teachers, except those specialized in ICT, to work with information and computer technologies is a serious obstacle to pursuing our strategic priorities” (Minister for Education, 2005).

To conclude, the current profile of active practitioners in secondary schools in Bulgaria and the ageing of the teaching force alert for potential problems at the time of implementing a curriculum reform that suggests new teaching methods based on ICT and requires continuing training and professional development.

12.3.3 Expected competences for secondary education teachers

In previous chapters (chapters 8 and 11), we have seen that secondary education curriculum policy in Bulgaria is oriented towards a competency-based curriculum rather than a content-based as it used to be before. For the first time in 1999, a curriculum framework was adopted grouping individual subjects in eight curriculum areas and introducing interdisciplinary fields. The new curriculum framework is structured around the expected skills and competences students should acquire at the end of each grade for each subject. Furthermore, for the first time in the Bulgarian history of the education system, the new National Education Standards define the expected competences to be acquired by students at the completion of each educational level -where emphasis is made on problem-solving, teamwork, peaceful conflict resolution, dealing with complexity and living with ambiguity, be lifelong learners, and cope with constant changes. However, particularly in transitional countries, such as Bulgaria, secondary students can hardly be expected to acquire these 21st century competences, if the teachers in charge of their education simply are not qualified with them.

While a significant effort has been made at national level to reform secondary curriculum by increasing its relevance, linking curriculum areas and increasing flexibility for student-centered learning, the institutional arrangements and teachers' training programmes for both pre-service and in-service training for secondary school teachers are still anchored in the past. The overall lack of political and public confidence on the teacher training provision was made evident through the findings of our survey discussed in the previous chapters (see chapters 12.1 and 12.2).

The issue of teaching competences beyond and across different knowledge areas and disciplines becomes critical one in the context of the consensus around the 21st century competences needed for students. At the macro level, what teachers should know and be able to do, continue to be country specific, although it appears to be increasingly shaped by world trends. Six national studies carried out by the World Bank show quite a remarkable convergence in terms of the stakeholders' views as to the teaching competences that teachers should acquire and display in classroom (World Bank, 2005).

a) Consulted actors involved in the education system

The present chapter reviews the evidence gathered in respect of the importance attributed by the different informants to a reach gamma of competences internationally considered highly related to the teaching profession. The study examines the perspective of people closely associated with teacher education, as well as the opinion of secondary school teachers themselves. The study sample includes 201 informants grouped in seven different profiles (see chapter 10.4.2 for the detailed list of the informants):

- 10 ministry officials (indicated in the tables as Mi);
- 5 experts from three NGOs (indicated in the tables as NGO);
- 5 members of the Syndicate of Bulgarian Teachers in Sofia (indicated as Unions);
- 32 inspectors from 26 Regional Inspectorates on Education (indicated as Experts);
- 112 teachers from the 46 towns (indicated in the tables as Teachers);
- 13 university professors (indicated in the tables as Prof); and
- 24 university students (indicated in the tables as Students).

The fact that there is convergence in the opinion of the informants within the same group justifies this categorization. In addition, the opinion of these groups of respondents is statistically significant since the sample of our research is representative in terms of geographical coverage and number and profiles of actors involved in the education system.

b) Valorization of the competences by the different actors

As indicated in the protocol of our investigation (see chapter 10.3.2 on investigation tools), the seven group of respondents mentioned above were asked to rate the “direct” or “indirect” degree of importance (scale of 1 = not important; 2= indirectly important; 3 = directly important) that developing each competency would have for secondary level teaching, and for organizing teacher education activities accordingly.

By “degree of importance”, we mean the relevance that each competence has in the Bulgarian school system and specifically this of secondary schooling, as well as in the

broader social and cultural national context. Thus, the degree of importance is understood by whether each of the listed competences is indispensable or not for transmitting successfully new content and values to secondary education students in Bulgaria. Therefore, as “directly important” is defined a competency absolutely necessary for teachers to perform successfully their profession. “Indirectly important” is a useful competency but not necessarily required for secondary education teachers in Bulgaria, while “not important” is an absolutely irrelevant and unnecessary competence for the teaching force in the Bulgarian education context.

We considered significant to examine the degree of importance each respondent attributes to each competency, because in a way, this reflects the actual and ideal image this respondent has on the effective action of teachers in the classroom and school. It reveals the expectations that he/she has from schoolteachers in terms of their qualifications and the way he/she perceives the responsibilities and role of secondary teachers nowadays in Bulgaria.

As indicated in the protocol of our investigation (see chapter 10.3.2), competences with a mean of 2.75 or higher are considered “directly” important and those with a mean between 2.74 and 1.75 are considered as “indirectly” important. Only one competency from the entire list was rated as “not important” from a group of respondents and therefore we will not deal with this category (see Annex 23 for the detailed statistical analysis of the completed list of competences by domain and group of respondents).

c) Significance of the survey

The findings of this survey allow us to:

- Develop a comprehensive understanding of the competences and skills that are considered important by the Bulgarian society for secondary education teachers. This will allow us to examine the degree of implication of the different actors in the curriculum reform, which may determine the degree of its potential success or failure. For instance, the possibility of divergence between the opinion of policy-makers and this of the actual practitioners on teacher training needs and teaching

skills could alarm us on the possible existence of gaps and difficulties for the successful implementation of the curriculum reform. This, in its turn, could help us to identify those sectors that need special attention and immediate intervention.

- Identify those areas that according to the opinion of different actors involved in the education system, teachers require further support and training so as to cope with the new needs emerging from the curriculum reform and the demands of the 21st knowledge-based society. This may help the design and development of training courses to be incorporated into the curriculum of university teacher training and further teachers' professional development activities.

In continuation, we present the findings in three different but complementary ways:

- a) by the degree of importance attributed by each group of respondents to the main categories of competences that constitute each of the three domains: teaching domain, school domain and professional domain;
- b) by those competences rated as most and least important by each group of respondents;
- c) by those competences rated as most and least important across the groups of respondents.

Finally, we discuss the opinion of the actors on whether active Bulgarian teachers in secondary schools today display most of the listed competences, and in which of the three domains: teaching, school and professional domain, secondary education teachers require further training in order to deliver successfully the new curriculum.

12.3.3.1 Degree of importance by competence domain and responding group

The results presented below (see table 12.4) are organized by domain of competences and group of respondents. Each domain is subdivided between two and seven main categories of competences (see protocol of investigation chapter 10.3.2).

The *teaching domain* is represented in seven main categories of competences:

1. Designing teaching-learning situations for the subject-matter to be learned, and doing so in function of the students and of the development of competences included in the curriculum.
2. Steering teaching-learning situations in order for the content to be learned, and doing so in function of the students and of the development of the competences included in the curriculum.
3. Evaluating learning progress and the degree of acquisition of students' competences in the subject matter to be learned.
4. Planning, organizing, and supervising the way the group-class works, in order to help students learning and socialization processes.
5. Adopting teaching to student diversity.
6. Integrating the technologies of information and communication into the preparation and development of teaching-learning activities, classroom management, and professional development.
7. Communicating clearly and correctly, both oral and written, in the different contexts related with the teaching profession.

The *school domain* is subdivided in two main categories of competences:

1. Co-operating with the school staff, with parents, and with the various social agents to achieve the school's educational targets.
2. Working in co-operation with the other members of the teaching staff in tasks enabling the development and evaluation of the explicit competences of the training plan, and doing so in function of the students.

The *professional domain* is divided in three main categories:

1. Acting critically as a professional, interpreting the objects of knowledge or culture in performing one's functions.
2. Becoming involved in an individual and collective project of professional development.
3. Acting ethically and responsibly in the performance of functions.

In processing the results, some significant similarities and differences were found among different types of respondents in terms of the degree of importance they attribute to each group of competences (see table 12.4):

A. Overall conclusions by responding group:

1. Only one group of respondents, the teachers' unions, identified as directly important all set of competences belonging to all the three domains: teaching, school and professional. This is to be expected as teachers' unions defend the corporate interests of teachers. As many competences require indispensable for teachers to display, more they value and demonstrate the importance and complexity of their labor.
2. All group of respondents considered as directly important the set of competences belonging to the teaching domain expecting from teachers to know the subject matter, teach effectively and communicate properly. This finding reveals the traditional perspective of the teaching responsibility that prevails in the Bulgarian community: teachers should know in depth the subject matter and be able to transmit knowledge efficiently. Other more "modern" competences that teachers should acquire are not yet consolidated in people's mind.
3. Only two out of the seven responding groups, the teachers' unions and members of NGOs, valued competences related to the school domain according to which schools function as social communities where teachers should cooperate with the other members of the teaching staff. It is interesting to find out that only these responding groups that from their nature constitute a group of people, a small community, such as teachers' union and Non-Governmental Organizations value the respective

competences on team working, cooperation, collaboration, exchange of ideas, etc. For the remaining responding groups, the teaching profession is perceived as an individual labor.

4. Ministry officials, students and university professors do not find it necessary for teachers to display competences linked to the professional domain, such as *acting critically ethically and responsibly as a professional in the performance of their duties*. This is a weak point for implementing successfully measures targeted to the professional development of teachers mainly because policy-makers themselves and university professors responsible for teachers' formation do not see the need.
5. It is remarkable to see that from the seven different groups of respondents, there is absolute convergence only between the opinions of Ministry officials and students. These are the two extreme ends in the social scale of the teaching activity: those at the top who design the education and those at the bottom who receive it. These two groups identify as directly important for teachers only one group of competences out of the twelve belonging to the teaching domain: *the ability of teachers to communicate clearly and correctly both oral and written*.
6. It is also interesting to see that the above-mentioned group of competences referring to the communication skills of teachers is the only one for which all responding groups agreed that it is directly important for the teaching profession. This puts in evidence that beyond all competences unanimously important is the communication between and among teachers and students, teachers and parents, teachers and the other school staff. The acknowledgement of the need for communication is a strong point for the Bulgarian pedagogic society in order to secure the democratic principles and spirit at schools and facilitate the implementation of the curriculum reform.
7. The opinions of teachers and inspectors are aligned from the point of view that both of them value competences belonging to the teaching domain and the professional, although they do not value exactly the same competences within these domains. It is a positive sign to find convergence in the viewpoints of those who lead the teaching-

learning process and those who evaluate this performance. Although, these groups do not value the need for teachers to act in a school, which functions as a learning community and this contradicts with the current global trends.

B. Overall conclusions by domain of competences

In concrete, as far as it regards the **teaching domain competences**:

1. *Designing teaching-learning situations for the subject matter to be learned* was identified as directly important only by teachers' union, university professors and inspectors. Far less importance was given to this competency by secondary education teachers, Ministry officials, members of NGOs and university students. This set of competences refers mainly to the knowledge of the subject matter and its effective transmission to students. It is worth noting that those who value more this competence are university professors and inspectors who are specialized in a concrete subject. One could expect to find convergence in the opinion of teachers and teachers' unions but it seems that the latter see this set of competences more from the perspective of defending one's specialization and the status of each subject in the school curriculum.
2. *Steering teaching-learning situations in order for the content to be learned* considered very important only by the members of the Bulgarian Teachers' Syndicate in Sofia, secondary education teachers and university professors. This is to be expected as those groups are the only actors who actually teach and are expected to display such competences.
3. *Evaluating learning progress and the degree of acquisition of students' competences* was rated as directly important only by teachers' unions and university professors. Secondary education graduate (current university) students attributed the lowest rate to this category of competences in comparison to the other groups of informants (see annex 22). We should point out that this survey was conducted at a time when the

introduction or not of an external national school-leaving exam was a hot topic of an extensive and often conflictive debate among different actors in the educational system. We have already seen (see chapter 11.3 Students' evaluation and assessment system) that university professors and teachers were in favor of an objective external exam, whether students and parents were opposed to its introduction. If we associate the findings of our interviews with the findings of this survey, we can see that the groups who were in favor of the national Matura exam were also attributed greater emphasis in the competences of teachers to evaluate and assess students.

4. Inspectors, secondary education teachers and teachers' unions considered directly important the set of competences on *Planning, organizing, and supervising the way the group-class works, in order to help students learning and socialization processes*. One could say that responding groups value as important those competences that correspond to their main functions in the educational system.
5. Only the members of NGOs and teachers' unions considered very important the set of competences on *adopting teaching to student diversity*. It is evident that from their one nature, these two responding groups are sensitive towards issues of solidarity within the educative activity. The rest of the informants and especially inspectors (experts) did not perceive this competence as indispensable for teachers. The lack of understanding on the need to cope with students with special educational needs as well as students of different economic and cultural background may debilitate ongoing efforts of the Bulgarian government to mainstream these students in public comprehensive schools. It is surprising that even ministry-officials themselves are not sensitive towards this issue, which is vital for the education system in Bulgaria, if one consider the significant number of minorities such as Roma and other disadvantage groups who constitute the major number of dropouts in secondary schools (see 6.1.2 ethnic and language distribution).
6. *Integrating ICT into the preparation and development of teaching-learning activities* was rated as directly important only by university professors and teachers' unions. Ministry officials and to far less extent teachers, students and inspectors (experts)

did not value competences that enable teachers to use ICT in the teaching-learning process. The lack of understanding the benefits computers can bring in the teaching-learning process is one of the weakest points of the Bulgarian actors involved in the education system. It becomes evident that only the group of teachers' unions who believe that computers can support the teaching profession and university professors who realize the need of ICT in their daily functions (conducting research, retrieving ICT-based information, etc.) value such competences. This makes obvious that there is a great need for (in)formatting the Bulgarian society on the utility of ICT as a pedagogical tool.

7. All respondents with no exception at all attributed high importance to the competence on *communicating clear and correct, both oral and written, in the different contexts*. This is something that we have concluded earlier on (see A. Overall conclusions by responding group) highlighting its importance for the successful implementation of the curriculum reform.

As far as it regards the **school domain competences**:

1. *Co-operating with the school staff, with parents, and with the various social agents to achieve the school's educational targets* is identified as very important only by the Teachers' Union in Sofia, while in contrary, inspectors (experts) think it is the least important (see annex 22). One may deduce that the former responding group assigns the teaching procedure on the societal level based on their proper activity, whether the latter, sees the problematic of the teaching-learning process within the borders of the classroom.
2. *To work in co-operation with the other members of the teaching staff* is valued as an important competency only by teachers' unions, while ministry officials, NGO members, teachers, university professors, students and inspectors did not include this in the list of the necessary competences. It is obvious that all responding groups, except the members of teachers' union, have rather individual activities to perform. Members of teachers' unions consider education matters within a broader spectrum of bilateral or multilateral co-operation.

Finally as far as it regards the **professional domain competences**:

1. *Acting critically as a professional* was considered indispensable only by the members of NGOs and teachers' unions. From what we have said up to now, one could remark that the professional status of teachers is not widely accepted in Bulgaria. This is a challenging issue for more European countries who strive to increase the attractiveness and status of the teaching profession (OECD, 2004b). It is good enough to find out that merely professional institutions, such as NGOs and teachers' union, understand more easily the professional side of teachers' responsibilities. Special attention though should be given in raising awareness towards the professionalisation of teachers in Bulgaria.
2. *Becoming involved in an individual and collective project of professional development* was not among the priorities of any of the group of respondents. This is worrying mainly in a time when a curriculum reform and a broader educational change are taken place in Bulgaria. The lack of acknowledging the need for upgrading teachers' competences to cope with the new emerging needs of such reforms could be a great obstacle to its success. These findings reveal the need for giving incentives and motivating Bulgarian teachers to participate in programmes of professional development and commit themselves to carry out this reform.
3. *Acting ethically and responsibly in the performance of functions* was not considered significantly important by ministry officials, university professors and students. While this can be viewed as a sever deficiency, one could think that these responding groups may not think that this is a priority, as other crucial areas mentioned above require immediate attention.

TABLE 12.4 DEGREE OF COMPETENCES' IMPORTANCE BY DOMAIN AND GROUP

Teaching Domain Competences	Mi	NGO	Unions	Teachers	Prof	Students	Inspectors
1. Designing teaching-learning situations for the subject-matter to be learned	×	×	✓	×	✓	×	✓
2. Steering teaching-learning situations in order for the content to be learned	×	×	✓	✓	✓	×	×
3. Evaluating learning progress and the degree of acquisition of students' competences	×	×	✓	×	✓	×	×
4. Planning, organizing, and supervising the way the group-class works	×	×	✓	✓	×	×	✓
5. Adopting teaching to student diversity	×	✓	✓	×	×	×	×
6. Integrating the technologies of information and communication into teaching-learning activities	×	×	✓	×	✓	×	×
7. Communicating clearly and correctly, both oral and written	✓	✓	✓	✓	✓	✓	✓
School Domain Competences							
1. Co-operating with the school staff, with parents, and with the various social agents	×	×	✓	×	×	×	×
2. Working in co-operation with the other members of the teaching staff	×	✓	✓	×	×	×	×
Professional Domain Competences							
1. Acting critically as a professional	×	✓	✓	×	×	×	×
2. Becoming involved in an individual and collective project of professional development	×	×	×	×	×	×	×
3. Acting ethically and responsibly in the performance of functions	×	✓	✓	✓	×	×	✓

Source: Author

✓: **directly important:** competences with a mean of 2.75 or higher

×: **indirectly important:** those with a mean between 2.74 and 1.75

NB. Only one competency from the entire list was rated as "not important" from a group of respondents and therefore we will not deal with this category (see Annex 23 for the detailed statistical analysis of the completed list of competences by domain and group of respondents).

12.3.3.2. Most important and least important competences by group of respondents

In continuation we present the set of the first highest rated competences, as **most important** and the **least important competences** for each the seven responding groups independently of the category they belong.

1) Ministry officials

The opinion Ministry officials have is very crucial since they are the ones who develop policy for reforming the educational system according to their believes and the perception they have on the strengths and weaknesses of the system. In the table below (see table 12.5), we present the competences they consider as *directly important* for the teaching profession. All listed competences were rated with the maximum point 3.

From the table it becomes obvious that most of the competences Ministry officials valorize as indispensable for secondary education teachers belong to the *teaching domain*¹⁰¹ and the remaining to the *professional domain*¹⁰² (see chapter 10.3.2). Ministry officials do not recognize as directly important competences that belong to the school domain. For them the co-operation between the school staff, the parents and the various social agents to achieve the school's educational targets is not directly important. In other words, they consider teachers responsible to teach effectively and professionally without having a direct role to play in the transformation of the school to a learning community by sharing knowledge and collaborating with their colleagues, the parents and other agents concerned. This opinion does not comply with the increasing trend in developed school systems to establish teachers' networks, to increase collaboration and knowledge sharing among the teaching staff not only of the same schools but also of other schools (Hargeaves, 2003).

¹⁰¹ Competences which allude to the capacity of teachers to mobilize a variety of cognitive resources to face and deal with a specific type of teaching situation.

¹⁰² Competences referring to the professional knowledge of teaching and teacher professional developments in terms of lifelong learning.

As far as regards the teaching domain competences, Ministry officials put an emphasis on the knowledge of the subject matter and the way it is delivered to students. They also valorize the ability of teachers to assess students' progress using formal tests, performance evaluations and informal assessments (see annex 23 items 35-37).

They recognize the importance of using adequate communication means and different learning rhythms adapted to the needs of students. Apart from valorizing students centered learning, they also acknowledge the importance for teachers to establish links with other subjects and to engage students in dialogue, i.e. they are in favor of interdisciplinary and interactive methods of learning.

Ministry officials see teachers as professionals who encourage the democratic conduct in classroom, allowing students to have and express different point of views. This was made obvious both by the findings of our survey (see table 12.5 items 87 and 88) as well as the personal interviews conducted with ministry officials.

In continuation, we present the lowest rated competences between 2.10 (item 34) and 2.30 (item 82) considered as *least important* for the teaching profession. From the findings, it becomes evident that while Ministry officials give importance to fruitful communication between teachers and students, this is limited in the context of the subject matter. They do not think it is important to involve students in the planning of the teaching process. They see teachers more as mere transmitters of learning, having a rather behaviorism approach towards their role. This may be a leftover of the authoritarian orientation of communism, which opposes to the theories of Freinet¹⁰³ and Montessori¹⁰⁴.

¹⁰³ The most important concepts of Célestin Freinet pedagogy are the following:

- Pedagogy of Work ("*Pédagogie du travail*") - meaning that pupils learned by making useful products or providing useful services.
- Co-operative Learning ("*Travail coopératif*") - based on co-operation in the productive process.
- Enquiry-based Learning ("*Tâtonnement expérimental*") - trial and error method involving group work.
- The Natural Method ("*Méthode naturelle*") - based on an inductive, global approach.
- Centers of Interest ("*Complexe d'intérêt*") - based on children's learning interests and curiosity (source: <http://freinet.org/icem/history.htm>).

¹⁰⁴ The Montessori Method is a teaching methodology developed in Italy by Dr. Maria Montessori. The method is characterized by an emphasis on self-directed activity on the part of the child and clinical observation on the part of the teacher (often called a "director", "directress", or "guide"). It stresses the importance of adapting the child's learning environment to his developmental level, and of the role of physical activity in absorbing academic concepts and practical skills (source: <http://www.montessori.org/>).

Ministry officials do not attribute learning mainly to factors related to the teaching-learning process and they do not find important for teachers to conduct research, which would enable them to develop and acquire further skills. This opinion is far away from the theory of investigation-action, which is highly valued and increasingly becomes a consolidated part of teachers' training programmes in other European systems (Hargeaves, 2003).

TABLE 12.5 MOST AND LEAST IMPORTANT COMPETENCES FOR MINISTRY OFFICIALS

Item*	Most important competences	No of answers
1	Mastering ways of representing and formulating the subject matter with the specific purpose of making it comprehensible to others	10
5	Knowing the contents of the subject matter and its relation to other subjects	10
25	Questioning to engage students in sustained discourse structured around powerful ideas	10
49	Organizing different learning rhythms adapted to students' possibilities and characteristics	9
65	Communicating ideas rigorously, using precise vocabulary and correct syntax; correcting errors made by students in their oral and written work; constantly, seeking to improve oral and written experience	10
71	Identifying the core issues in the subject in order to facilitate students' meaningful learning	10
87	Encouraging democratic conduct in class, giving students due attention and support	10
88	Allowing for differences in postures and points of view among students	10
Item	Least important competences	No of answers
15	Being able to describe the different ways of learning of their students	9
34	Explaining how teaching will be changed according to feedback received	10
42	Providing students with explicit information on how lesson time will be distributed	10
82	Encouraging colleagues to participate in research aimed at the acquisition of competences	10
84	Attributing learning mainly to factors related to the teaching-learning process	9

Source: Author

NB* The items numbered from:

01 - 65 belong to teaching domain competences

66 - 70 belong to school domain competences

71 - 94 belong to professional domain competences

2) Members of Non-Governmental Organizations

The opinion of the members of Non-Governmental Organizations who work as experts and researchers in the field of educational policy development is highly significant because it is not conditioned by their institutional status. The reforms implemented in the education system do not have a direct impact on them. The fact that they do not have personal, political or economic interests of the way the education system is shaped and evolves, allows them to observe the educational system and its function with a critical eye. Most of the time, they keep a neutral position between practitioners and policy-makers and they feel free to express their opinion which is based on scientific research and evidence. Often, they are those who consult/assist policy-makers to conceptualize or implement reforms and this makes their point of view even more significant for our study. We should also not forget that their role is increasingly acknowledged at world level, taken that the United Nations accepts them as official consulting bodies.

Based on the findings of our questionnaire, NGO members give special attention to the fruitful communication between teachers and learners; the democratic conduct in class; and the effective evaluation of students. They consider indispensable for secondary education teachers to display most of the competences belonging to the teaching domain and fewer to the school and professional domains. In the table below (see table 12.6) they are presented only those competences rated with the highest point of 3.

As far as regards the teaching domain, they consider as directly important competences belonging to six out of the seven categories. Namely, they acknowledge the importance of designing and steering teaching-learning adequate situations for the subject-matter to be easily learned by students; enhancing their critical thinking; monitoring and evaluating students' progress in terms of content learning and acquisition of new competences; fostering group-class works in order to help students' learning and socialization processes; adopting teaching to student diversity; and communicating clearly and correctly, both oral and written, in the different contexts related with the teaching profession.

From the school domain, they consider as directly important for teachers to collaborate with other members of the pedagogical team for achieving consensus on the design and adaptation of teaching-learning situations and the evaluation of learning. In general though, they attribute far less importance to competences belonging to this domain in comparison to the other two: the teaching and professional domains.

From the domain of professionalism, they value as directly important for teachers to display competences that enable them to act critically as professionals facilitating students' meaningful learning; to be aware of the values at stake in one's performance; and to encourage democratic conduct in class giving students due attention and support.

From the competences considered as *least important* for the teaching profession we present in the table below (see table 12.6) those rated by NGO members with the lowest grades: between 2.00 (items 3 and 19) and 2.40 (items 11, 15, 23, 43, 56, 57, 67, 79 and 80). These competences are related to knowing the background of students; conducting research; using ICT in teaching processes; and preventing and intervening in the incorrect behavior of students.

The lack of valuing the family and cultural background of students shows that NGO members are not informed on recent research findings, which provide evidence that the achievement of students depends on the socioeconomic profile of their families. The results of international assessments such as PISA for example, show that students who come from rich families and have educated parents are better achievers than poorer students with uneducated parents (OECD, 2003a). This finding is also controversial to previously valued competences, such as involving teachers in bearing in mind social differences (sex, ethnic origin, socio-economic, and cultural), needs and special interests of the students; taking a critical look at one's own origins and cultural practices, and at one's social role, and being aware of the values at stake in one's performance, since for teachers to display such competences, it is required to know about students' family and cultural background.

NGO members as Ministry officials do not value the research skills for teachers and do not consider important the use of computers for the preparation and development of teaching-

learning activities, classroom management, and professional development. This is unforeseen as educational experts working at NGOs usually have a more international perspective of developments in the educational sector, being well informed on the added value computers bring to pedagogy.

Finally, NGO members do not valorize the role of teachers as contributors and controllers of students' correct school and social behavior.

TABLE 12.6 MOST AND LEAST IMPORTANT COMPETENCES FOR NGO MEMBERS

Item*	Most important competences	No of answers
1	Mastering ways of representing and formulating the subject matter	5
2	Understanding of how students of different ages and backgrounds learn more easily	5
16	Uses strategies to put into action student prior knowledge	5
21-22	Establishing a learning environment that invites students to think and act autonomously	5
28-29	Providing correct and timely feedback to students, and monitoring their understanding	5
30	Giving the students opportunities to practice and apply what they are learning	3
35-36	Constructing instruments to enable evaluation of students progress	5
44-45	Fostering students' participation in establishing the norms to work and live together	5
49	Organizing different learning rhythms adapted to students' possibilities and characteristics	4
54	Participating in the preparation and implementation of a plan of adapted performance	5
60-65	Communicating clearly and correctly, both oral and written, in the different contexts	5
71-73	Reflecting about practice and acting upon the results of such reflection	4
83	Being aware of the values at stake in one's performance	4
85	Interpreting student learning difficulties as a challenge to be met	5
87-88	Encouraging democratic conduct in class, giving students due attention and support	5
Item	Least important competences	No of answers
3	Analyzing students' misconceptions concerning the subject matter	5
11-15	Being able to describe the different ways of learning of their students	5
14	Knowing about family and cultural background of students	5
19	Presenting the subject matter in networks of knowledge structured around powerful ideas	2
23	Making available to students the resources necessary in the learning situations proposed	5
43	Communicating clearly to students the requirements of correct school and social behavior	5
46	Adopting strategies to prevent incorrect behavior and intervening effectively when it does	5
59	Helping students use the ICT in their learning activities	5
67	Promoting participation and the flow of relevant information to parents	5
79	Evaluating one's own competences and adopting the means to develop them	5
82	Encouraging colleagues to participate in research aimed at the acquisition of competences	5
80	Exchanging ideas with colleagues about the suitability of pedagogical and didactic options	5

Source: Author

3) Members of teachers' unions

The opinion of the members of the Bulgarian syndicate of teachers in Sofia is significant from the point of view that they are those who together with the teachers, better understand their needs. They are those who are in a position to raise their voice to Ministry officials, to fight for the preservation of the rights and social status of the teachers. They are those who defend the necessities and the position of teachers within the school and the broader social community.

However, it is to be expected that the members of teachers' unions have a corporate interest with teachers and often are quite critical to government policies that do not fully comply with their expectations. They see the educational problems from the point of view of corporative interests and not from the perspective of the teaching-learning process. Thus, their opinion may be conditioned by their function in the educational system, which is to defend the working interests of teachers.

In the first section of the table below (see table 12.7), we present those competences rated as directly important with the maximum of 3 points. The findings show that the members of teachers' unions value a rich number of competences belonging to all the three domains: teaching, school and professional domain. They do though attribute a special interest to competences related to the teaching domain and especially to the knowledge of the subject matter.

Furthermore, they consider indispensable for teachers in secondary schools to adapt their teaching methods to students possibilities and cognitive, affective and social characteristics. They value the ability of teachers to communicate clearly and correctly, both oral and written, in the different contexts when addressing students, parents, or colleagues. They regard teachers as responsible for the continuous monitoring of students' understanding and evaluation of their progress through different formal and informal assessment tools.

Representatives of teachers organized in unions contemplate the importance of different multimedia tools, such as computers, as means for facilitating the learning and teaching

process. They also ponder the significance of the cooperation with the other school staff on defining targets and putting into practice projects for the improvement of the educational services.

While overall, it seems that members of teachers' unions have acknowledged most of the key competences for the teaching profession within the context of the knowledge society and more concrete in the case of Bulgaria, this conclusion becomes controversial when we examine the competences that they consider less important. The following paragraphs illustrate this controversial point of view.

While we saw that they value the cooperation with the other teaching staff, they limit this cooperation within concrete areas. For instance, they do not think it is important to cooperate with colleagues to determine the desirable rhythm and stages of progress in the training cycle, nor to exchange ideas on the available pedagogical and didactic options. Furthermore, encouraging colleagues to participate in research aimed at the acquisition of competences is not a priority for them.

Moreover, they do not think it is necessary to inform students and the public on the decisions taken for the organization of the teaching procedure. While they consider it indispensable for teachers in secondary schools to adapt their teaching methods to students' possibilities and cognitive, affective and social characteristics, they do not think it is important to take into consideration the social differences, needs and special interests of the students. These controversial findings do not allow us to draw clear conclusions on whether the members of teachers' unions are in favor or not of student-centered teaching and learning methods, in which students have an active role to play both in the planning as well as the implementing phase.

Finally, while they contemplate the importance of different multimedia tools, they do not think teachers should display competences in evaluating the pedagogical potential of ICT for adopting a critical attitude to its advantages and limitations as a teaching and learning tool.

We should mention though that the competences rated as least important by the members of the teachers unions have being given in average 2.6 points which is quite high in comparison to the lowest rates given by the other group of respondents. This means that even though they do not consider the above-mentioned competences as directly important, they still find them useful for teachers. This makes them the only group of respondents who valued almost all the listed competences. One could think that on one hand, being the defenders of the teaching profession, members of teachers' unions by valuing a rich gamma of competences prove the important and complex labor of being a teacher. On the other hand though, they also acknowledge the multifaceted responsibilities that teachers should assume at the time of implementing a reform.

TABLE 12.7 MOST AND LEAST IMPORTANT COMPETENCES FOR TEACHERS' UNIONS

Item*	Most important competences	No of answers
1	Mastering ways of representing and formulating the subject matter	5
5	Knowing the contents of the subject matter and its relation to other subjects	5
17	Creating the conditions for students to become involved in situations, bearing in mind their cognitive, affective, and social characteristics	5
28	Providing correct, substantive and timely feedback to students	5
35-37	Planning and applying adequate evaluation procedures for students' assessment	5
44	Fostering students' participation in establishing the norms to work and live together	5
47	Designing learning tasks adapted to students' possibilities and characteristics	5
57	Using a variety of multimedia tools (e.g. ICT) for communication and problem-resolving	5
60-65	Communicating clearly and correctly, both oral and written, in the different contexts	5
66	Co-operating with the other members of the school staff in defining targets, and in the preparation and putting into effect of projects on educational services	5
71	Identifying the core issues in the subject to facilitate students' meaningful learning	5
83	Being aware of the values at stake in one's performance	4
Item	Least important competences	No of answers
9	Bearing in mind representations, social differences, needs and special interests of the students	5
23	Making available to students the resources necessary in the learning situations proposed	5
39	Co-operating with the teaching staff to determine the desirable rhythm and stages of progress in the training cycle	5
40	Exchanging ideas with colleagues on the available pedagogical and didactic options	5
42	Providing students with explicit information on how lesson time will be distributed	5
43	Communicating clearly to students the requirements of correct school and social behavior	5
55	Adopting a critical attitude to the advantages and limitation of ICT as a learning tool	5
56	Evaluating the pedagogical potential of ICT	5
72	Critically distancing oneself from the subject taught	5
75	Establishing relationships between the cultural background embedded in the prescribed curriculum and that of the students	5
82	Encouraging colleagues to participate in research aimed at the acquisition of competences	5
90	Explaining to the public the decisions taken concerning students' learning and education	5

Source: Author

NB* The items numbered from:

01 - 65 belong to teaching domain competences

66 - 70 belong to school domain competences

71 - 94 belong to professional domain competences

4) Teachers

The opinion of the teachers is undoubtedly the most significant, since they are the ones who do the actual work knowing at first place the skills and competences they should be equipped with in order to perform successfully their profession. The opinion teachers have on the degree of importance of each competence reflects the way they perceive their role and responsibilities within the school time, and to a certain extent determines their real action. Analyzing the subjective opinion of teachers in this respect is therefore as significant as analyzing objective data (days of sickness leave, unjustified absences, etc.), which could alert us to potential dissatisfactions and lack of commitment to the application of this reform.

It is to be expected that if teachers do not perceive the new key competences required to bring forward the reform, is unlikely that they have understood the changes and the ultimate goal of the curriculum reform. Thus, the degree of their understanding towards the needs for specific skills and competences determines also the degree of their implication in this reform and its potential successful or not implementation.

The first section of the table below (see table 12.8) presents the most important of the listed competences according to the opinion of teachers rated between 2.95 (items 20, 43, 87 and 92) and 2.99 (items 1, 5 and 64).

It is notable from the findings that teachers give a special importance on competences related to the teaching domain, and especially, on the profound knowledge of the subject matter and its effective transmission to students. They are also in favor of an interactive teaching-learning process, stimulating students to be actively involved during classroom time. They valorize the provision of feedback to students and the regular monitor and assessment of their understanding (see annex 23 items 35 and 37). They also recognize the importance of communicating clearly and appropriately with them as well as with their parents. Finally, they understand the importance of helping students to work and live together, communicating clearly to them the requirements for an appropriate school and social behavior.

Teachers do not regard as directly important competences belonging to the school domain, while from those belonging to the professional domain; they valorize only competences related to the democratic conduct in the classroom avoiding any kind of discrimination.

As far as regards the least important competences for teachers, we list in the table 12.8 those rated between 2.07 (item 58) and 2.31 (item 73). It is surprising to find out that among them there are competences related to the ICTs and their potential use as a pedagogical tool. It becomes obvious that teachers do not know the utility of computers for investigating, interpreting, and communicating information, and resolving problems. It is also interesting to see that while valuing the knowledge on the subject matter they do not think it is indispensable for teachers to be able to establish relationships among different fields of the subject matter knowledge; and this, in the time when the new curriculum is being applied in schools, structured in curriculum areas, which establish interdisciplinary links.

Furthermore, teachers do not find important the self-evaluation as a mean to identify their needs and further develop their competences, which in reality is a *sine qua non* requirement for professional development. Finally, they do not see the need to exchange ideas with colleagues about the suitability of pedagogical and didactic options, neither to encourage them to participate in research aimed at the acquisition of competences. In general lines, there is a tendency for individualism, as what they valorize most is whatever they can do alone.

Knowing about family and the cultural background of students; seeking pertinent information regarding students' needs; helping the social integration of students with learning or behavioral difficulties; and participating in the preparation and implementation of a plan of adapted performance are also among the lowest rated competences by teachers (see annex 23). It is surprising to find out that while one of the policy priorities in Bulgaria is the mainstreaming of children with special education needs, Bulgarian teachers do not think that is within their responsibilities to know how to help these children to be integrated in the school.

TABLE 12.8 MOST AND LEAST IMPORTANT COMPETENCES FOR TEACHERS

Item	Competences	No of answers
1, 8	Mastering ways of making the subject matter comprehensible to others	111
5, 6	Knowing the contents and perspectives of the subject matter and its relation to other subjects	112
20	Making it obvious that learning of subject matter is essential	111
17, 21	Establishing a learning environment that invites students to think and act autonomously bearing in mind their cognitive, affective, and social characteristics	112
25	Questioning to engage students in sustained discourse structured around powerful ideas	112
28	Providing correct, substantive and timely feedback to students	110
29	Adequate monitoring of student understanding	111
43	Communicating clearly to students the requirements of correct school and social behavior	110
44	Fostering students' participation in establishing the norms to work and live together	110
60	Using the appropriate oral language when addressing students, parents, or colleagues	111
61	Presenting clearly the purposes of each lesson	112
64	Using questions to stimulate students to reflect on content and think critically about it	111
65	Communicating ideas rigorously and seeking to improve students oral and written experience	112
87	Encouraging democratic conduct in class, giving students due attention and support	110
92	Avoiding all forms of discrimination by students, parents, and colleagues	111
Item	Competences	No of answers
23	Making available to students the resources necessary in the learning situations proposed	109
51	Organizing heterogeneous groups for students to work together	104
55	Adopting a critical attitude to the advantages and limitation of ICT as medium for learning	111
56	Evaluating the pedagogical potential of ICT	110
58	Using the ICT effectively to set up networks of exchange related with the subject taught	111
72	Critically distancing oneself from the subject taught	107
73	Reflecting about practice and acting upon the results of such reflection	111
75	Establishing relationships between the cultural background embedded in the prescribed curriculum and that of the students	110
78	Establishing relationships among different fields of the subject matter knowledge	110
79	Evaluating one's own competences and adopting the means to develop them	109
80	Exchanging ideas with colleagues about the suitability of pedagogical and didactic options	112
82	Encouraging colleagues to participate in research aimed at the acquisition of competences	110

Source: Author

NB* The items numbered from:

01 - 65 belong to teaching domain competences

66 - 70 belong to school domain competences

71 - 94 belong to professional domain competences

5) University professors

As we have explained in chapter 12.1, pre-service education for teachers takes place at the universities. Therefore, university professors are the main responsible for the initial education of teachers. They are those who should equip teachers with the adequate knowledge, skills and competences to be able to cope with the requirements of the teaching profession. Bearing this in mind, the opinion of this group of respondents is significant since it reveals the expectations that university professors have for teachers and on which specific competences place the focus at the time of their training.

In the table below (see table 12.9) there are listed those competences considered by university professors as directly important to the teaching profession and have been rated with the maximum 3 points.

University professors, as Ministry officials and teachers, valorize more competences related to the teaching and professional domains rather than the school domain. They perceive teaching as an interactive activity between teachers and learners based on pedagogical methods adapted to students' possibilities and characteristics, different ages and backgrounds. They believe that teachers should be in charge to develop to their students skills related to critically thinking, problem solving, decision-making, and making other higher-order applications. This of course implicates that teachers themselves should display such skills at first place.

They also value the knowledge of the subject matter but also the ability to establish relationships with the other curriculum subjects, being in this way the only group of respondents who values interdisciplinarity (see table 12.9 item 5).

They give a special attention to the adequate communication skills of teachers. They believe that teachers should be able to take a position and discuss coherently, effectively, constructively and respectfully when addressing students, parents, or colleagues, avoiding all forms of discrimination.

According to university professors, teachers should regularly evaluate and monitor students' progress using formal tests and performance evaluations as well as informal assessment tools. Moreover, teachers should be in a position to evaluate their own competences and should take care for improving their skills and competences.

Finally, university professors expect from teachers to know the pedagogical potential of ICT and its limitations and help students use computers in their learning activities (see annex 23 items 55, 56 and 59).

From what we have just said, it seems that university professors have an idyllic conception for the teaching-learning process. We should recall though that the 71.9% of the 199 respondents of our survey are not satisfied with the current pre-service teachers' training system. One should expect that if university professors have great expectations from teachers, they should also know how to prepare them adequately (see figure 12.1 in chapter 12.1.2).

As far as regards the least valued competences by university professors, the findings reveal some contradictions. The second section of the table below presents the lowest rated competences: between 2.31 (items 42, 51 and 90) and 2.46 (items 54, 58, 68 and 84).

While they value the differentiating teaching according to students' characteristics and backgrounds, they do not think it is necessary to know about the family and cultural background of their students. This is surprising as the latter is a precondition for carrying out the former.

University professors, do not think it is absolutely required for teachers to exchange ideas with colleagues on the appropriateness of the available pedagogical and didactic options, neither to participate in the preparation and implementation of a plan of adapted performance. Finally, they do not see the benefit of using the ICT effectively to set up networks of exchange related with the subject taught.

From the findings, it becomes immediately obvious that from the three domains of competences under examination, the one that this group of respondents values less is the

school domain. In other means, university professors do not think it is directly important nowadays for the Bulgarian context to build up a knowledge management system in schools, which should function as learning communities capable of responding to the needs of students as citizens who have the right to learn.

TABLE 12.9 MOST AND LEAST IMPORTANT COMPETENCES FOR UNIVERSITY PROFESSORS

Item	Most important competences	No of answers
2	Understanding of how students of different ages and backgrounds learn more easily	13
5	Knowing the contents of the subject matter and its relation to other subjects	13
22	Using teaching approaches that invite thinking about different possibilities	13
25	Questioning to engage students in sustained discourse structured around powerful ideas	13
33	Flexibly altering learning activities according to feedback received	13
36	Constructing instruments to enable evaluation of progress and acquisition of competences	13
47	Designing learning tasks adapted to students' possibilities and characteristics	13
63	Knowing how to take a position, and maintain one's ideas and discuss coherently, effectively, constructively and respectfully	13
64	Using questions to stimulate students to reflect on content, think critically about it and use it in problem solving, decision making, and other higher-order applications	13
79	Evaluating one's own competences and adopting the means to develop them	13
Item	Least important competences	No of answers
14	Knowing about family and cultural background of students	13
15	Being able to describe the different ways of learning of their students	13
24	Giving students opportunity to learn, dedicating most of the available time to curriculum activities	13
46	Exchanging ideas with colleagues on the appropriateness of the available pedagogical and didactic options	13
42	Providing students with explicit information on how lesson time will be distributed	13
51	Organizing heterogeneous groups for students to work together	13
54	Participating in the preparation and implementation of a plan of adapted performance	13
58	Using the ICT effectively to set up networks of exchange related with the subject taught	13
67	Promoting participation and the flow of relevant information to parents	13
68	Encouraging student participation in the management of the school and its activities	13
82	Encouraging colleagues to participate in research aimed at the acquisition of competences	13
84	Attributing learning mainly to factors related to the teaching-learning process	13
90	Explaining, in function of the public interest, the decisions taken concerning students' learning and education	13

Source: Author

6) University students

We have chosen to ask the opinion of university students on the necessary competences secondary education teachers should have in Bulgaria for two main reasons: firstly because those university students contacted, they have been studying in secondary schools at the time the reform was taken place and the new curriculum for secondary education was being applied at schools. Therefore, they were the firsts to witness the change and identify the strengths and weaknesses of their teachers' competences to deliver the new curriculum. Secondly, some of them are thinking to become teachers and therefore have a special interest in the topic. These two points make the opinion of university students towards the role and competences of teachers significant for our study.

In the table 12.10, we present the highest rated competences based on the university students: between 2.83 (items 21, 48, 52, 85 and 92) and 2.96 (item 71).

University students attribute a balanced value to competences belonging to all the three domains: teaching, school and professional. They realize that teachers should not only know the content of the subject matter but also to use the adequate pedagogical methods while teaching, to contribute to establishing a school learning community collaborating with their colleagues and to be professionals when they perform their duties.

Students expect from teachers to have a good knowledge of the subject they teach and to be able to establish links within the different fields of the subject matter knowledge. They are in favor of an interactive teaching-learning process during which a teacher always monitors the degree of students' understanding. They give focus on the communication skills of their teachers while interacting with them, their parents, or with their colleagues.

Students are the only group of respondents being sensitive with the issue of the social integration of students with learning or behavioral difficulties. They understand the need for teachers to be able to cope with diversified classrooms, avoiding all forms of discrimination and converting the classroom in an appropriate and beneficial learning environment for everybody.

While they do not give the highest rates to competences belonging to the school domain, still students consider them directly important for the teaching profession and especially those referring to the cooperation with the other members of the school staff in defining targets, and in the preparation and putting into effect of projects on educational service. They also expect from their teachers to encourage students' participation in the management of the school and its activities and projects (see annex 23 item 68).

From the competences perceived by students as indirectly important for teachers, we selected to present on the table below those rated with the lowest grades between 2.00 (item 34) and 2.30 (item 54).

Students while valuing the capacity of teachers to help for the social integration of students with different abilities and backgrounds, they do not think it is necessary for teachers to know the family and cultural background of them and their social differences, or to seek pertinent information regarding students' special interests and needs. This is contradictory as one is a precondition of the other.

Students see the benefit for teachers to collaborate among them but within certain limits. For instance, they do not think this is absolutely necessary for performing tasks such as determining the rhythm and stages of progress, or exchanging ideas regarding the appropriateness of the available pedagogical and didactic options.

It is interesting to find out that also for students as for other groups, competences related to the integration of ICT into the preparation and development of teaching-learning activities, classroom management and professional development are not directly important.

Finally, students do not see why teachers should need to know how to make judicious use of the legal and authorized framework governing the profession, or to be informed about national educational policies related to the curriculum, their contractual obligations and quality management.

TABLE 12.10 MOST AND LEAST IMPORTANT COMPETENCES FOR UNIVERSITY STUDENTS

Item	Most important competences	No of answers
20	Making it obvious that learning of subject matter is essential	24
21	Establishing a learning environment that invites students to think and act autonomously	24
29	Adequate monitoring of student understanding	24
48	Foreseeing learning situations that allow for an integration of competences in different contexts	24
52	Helping the social integration of students with learning or behavioral difficulties	24
60	Using the appropriate oral language when addressing students, parents, or colleagues	24
63	Knowing how to take a position and discuss coherently, effectively, constructively and respectfully	23
71	Identifying the core issues in the subject to facilitate students' meaningful learning	24
75	Establishing relationships among different fields of the subject matter knowledge	24
85	Interpreting student learning difficulties as a challenge to be met	24
92	Avoiding all forms of discrimination by students, parents, and colleagues	24
Item	Least important competences	No of answers
9	Bearing in mind representations, students' social differences, needs and special interests	24
14	Knowing about family and cultural background of students	24
15	Being able to describe the different ways of learning of their students	24
34	Explaining how teaching will be changed according to feedback received	24
39	Co-operating with the teaching staff to determine the rhythm and stages of progress	24
40	Exchanging ideas with colleagues regarding the appropriateness of the available pedagogical and didactic options	24
53	Seeking pertinent information regarding students' needs	24
54	Participating in the preparation and implementation of a plan of adapted performance	23
55-59	Integrating ICT into the preparation and development of teaching-learning activities, classroom management and professional development	24
69	Knowing which are the situations requiring collaboration with other members of the pedagogical team for the design, adaptation and evaluation of teaching-learning situations	24
93	Making judicious use of the legal and authorized framework governing the profession	24
94	Knowing about national educational policies related to the curriculum, contractual obligations of teachers and quality management	24

Source: Author

NB* The items numbered from:

01 - 65 belong to teaching domain competences

66 - 70 belong to school domain competences

71 - 94 belong to professional domain competences

7) Inspectors

In chapters 8.1.2 and 11.5 we had the opportunity to discuss the role of the inspectors in the Bulgarian education system. We saw that inspectors are subject experts who among other tasks, they are called to evaluate the work of teachers. They are those who should identify good and bad practices, recommend which teachers need additional training, reward those who are doing a good job and guide those who need assistance. Thus, the opinion of the inspectors on the required competences for teachers is very important, since based on this opinion, they assess and evaluate the work of the teaching force.

In the table below (see table 12.11) we selected to present the highest rated competences between: 2.97 (such as items 5, 8 and 17) and 3.00 (such as items 20, 33 and 83) and the lowest competences rated between 0.28 (item 82) and 2.03 (items 57, 75, 78 and 80).

The findings do not allow us to get a clear idea of how inspectors perceive an ideal teacher, neither an appropriate teaching-learning situation. What we can say for sure is that based on the findings, inspectors expect from teachers to have a plethora of competences concerning the teaching domain, while to school domain competences and those competences that define the degree of professionalism of teachers, they attribute much less weight. One could assume that inspectors are still focusing on the more traditional competences which require a teacher to know well the subject to be taught.

Examining those competences considered directly important for inspectors, one would say that they value the knowledge of teachers on the individual as well as the interdisciplinary dimension of the subjects they teach, based on interactive and student-centred teaching methods. Explicitly, inspectors believe that the most important competences for Bulgarian teachers today are to know the contents of the subject matter and its relation to other subjects; to create the conditions for students to become involved in situations, bearing in mind their cognitive, affective, and social characteristics; and to invite student to think and act autonomously.

However, the degree to which inspectors endorse the teaching-learning procedure with interactive and democratic principles that respond to the special needs of students is being

questioned as they rate very low competences involving students in the teaching-learning process, such as allowing to practice and apply what they are learning and to receive improvement-oriented feedback; to establish relationships among different fields of the subject matter knowledge, aligning the cultural background embedded in the prescribed curriculum and that of the students; and to make the class a place open to multiple viewpoints.

Within the teaching domain competences, inspectors, together with ministry officials, members of NGOs and teachers' unions, as well as university professors give special attention to the evaluation and assessment procedures used by teachers. This is understandable due to the role they have in the education system and also because the assessment results can be a useful basis for them to be able to assess further students and teachers. We should not forget however that the function of inspectors is ambiguous: on one hand they contribute to the further development of teachers' competences and on the other, they have the power to attribute punishments to the low performers.

Finally, they value the communicative abilities of the teachers entrusted in an appropriate oral language when addressing students, parents, or colleagues (see table 12.11, item 60).

However, inspectors do not see as necessary the co-operation between the school staff, parents and various social agents for achieving the school's educational targets. Co-operating with the other members of the school staff in defining targets, and in the preparation and putting into effect of projects on educational services; promoting participation and the flow of relevant information to parents; encouraging student participation in the management of the school and its activities and projects; working in co-operation with the other members of the teaching staff in tasks enabling the development and evaluation of the explicit competences of the training plan, and doing so in function of the students; knowing which are the situations requiring collaboration with other members of the pedagogical team for the design and adaptation of teaching-learning situations and the evaluation of learning; working to achieve the required consensus among the members of the teaching staff, are not necessarily required competences for secondary education teachers in Bulgaria, according to the opinion of inspectors (see annex 23, items 66-70).

Inspectors, as Ministry officials, NGO members, students and teachers, do not think it is directly important for teachers to know how to apply information and communication technologies in pedagogy. In consequence, competences that enable teachers to integrate ICT into the preparation and development of teaching-learning activities, classroom management and professional development are not viewed as necessary.

Inspectors expect from teachers to act ethically and responsibly in the performance of their functions displaying certain competences belonging to the professional domain, such as, avoiding all forms of discrimination by students, parents, and colleagues; making judicious use of the legal and authorized framework governing the profession; and dealing pedagogically with student negative comments. They don't see though the need for teachers to become involved in an individual and collective project of professional development, neither to be able to evaluate one's own competences and adopt the means to develop them using available resources. This is quite surprising as inspectors should normally motivate teachers to develop further their skills and care for their professional development.

Moreover, exchanging ideas with colleagues about the suitability of pedagogical and didactic options; and encouraging colleagues to participate in research aimed at the acquisition of competences set out in the training plan and educational targets of the school are not absolutely necessary (see annex 23, items 80 and 82).

TABLE 12.11 MOST AND LEAST IMPORTANT COMPETENCES FOR INSPECTORS

Item	Most important competences	No of answers
4	Planning sequences of teaching and evaluation bearing in mind the logic of the content and of the learning process	31
5	Knowing the contents of the subject matter and its relation to other subjects	32
8	Identifying key elements of the subject matter to facilitate meaningful learning for students	32
17	Creating the conditions for students to become involved in situations, bearing in mind their cognitive, affective, and social characteristics	32
20	Making it obvious that learning of subject matter is essential	32
21	Establishing a learning environment that invites students to think and act autonomously	32
25	Questioning to engage students in sustained discourse structured around powerful ideas	32
29	Adequate monitoring of student understanding	32
33	Flexibly altering learning activities according to feedback received	32
37	Planning learning sequences and assessment procedures taking into account both subject matter and learning processes	32
41	Defining and applying an effective working system for normal class activities	31
44	Fostering students' participation by having everyone participate in the generation of behavioral norms, or at least insuring they are known by all	32
60	Using the appropriate oral language when addressing students, parents, or colleagues	31
61	Presenting clearly the purposes of each lesson	32
64	Using questions to stimulate students to reflect on content, think critically about it and use it in problem solving, decision making, and other higher-order applications	32
83	Being aware of the values at stake in one's performance	3
Item	Least important competences	No of answers
19	Presenting the subject matter in networks of knowledge structured around powerful ideas	32
27	Shaping students' learning by means of frequent and pertinent strategies, steps, questions, and feedback, so as to help the integration and transfer of learning	32
30	Giving the students sufficient opportunities to practice and apply what they are learning and to receive improvement-oriented feedback	32
39	Co-operating with the teaching staff to determine the rhythm and stages of progress in the training cycle	32
51	Organizing heterogeneous groups for students to work together	32
55-58	Integrating ICT into the preparation and development of teaching-learning activities, classroom management and professional development	32
72-73	Reflecting about practice and acting upon the results of such reflection	32
75	Establishing relationships between the cultural background embedded in the prescribed curriculum and that of the students	32
76	Making the class a place open to multiple viewpoints	32
78	Establishing relationships among different fields of the subject matter knowledge	32
79-82	Becoming involved in an individual and collective project of professional development	32

Source: Author

NB* The items numbered from:

01 - 65 belong to teaching domain competences

66 - 70 belong to school domain competences

71 - 94 belong to professional domain competences

12.3.3.3 Most and least important competences across responding groups

We present in continuation (see table 12.12) the most and least important competences considered across the different groups of respondents.

The most important competences were rated between 2.90 (items 8, 61, 62 and 87) and 2.96 (item 29) and belong to the domain of teaching and professional competences. It is clear that overall special attention is given to the subject matter knowledge but also to its relation to the other subjects of the school curriculum. This is a new requirement for teachers since for the first time in 1999, the Bulgarian school curriculum was presented as a consortium of curriculum areas rather than a list of individual subjects, and thus, teachers are called to be able to establish links within and among different curriculum areas.

All informants (Ministry officials, inspectors, teachers, university professors, students, members of teachers' unions and NGOs) independently of the group they belong to, their profession and function within the school system recognize those general competences that nobody can question nowadays their utility. These competences refer to the need for interactive teaching where students have an active role to play; the ability of teachers to establish a learning environment that invites students to think and act autonomously, engaging them in sustained discourse structured around powerful ideas.

All respondents see the necessity for adequate monitoring of students' progress using formal tests and performance evaluations, as well as informal assessments of students' contributions to lessons and work on assignments. Realizing the need for the effective assessment of students is very positive especially at a time when the Bulgarian government is designing and piloting national tests based on external evaluations for increasing their objectivity (source).

Finally, all informants value the set of competences referring to the adequate communication between teachers, parents and students. They expect from teachers to be able to communicate clearly and correctly, both oral and written, in the different contexts, encouraging a democratic conduct in class, and avoiding all forms of discrimination. The

fact that 201 respondents coming from different professions and geographical zones in Bulgaria recognized the need for effective communication within the pedagogical process is very positive since this constitutes a solid basis for enhancing dialogue and resolving potential problems.

On the other extreme, those competences considered by all group of respondents as the least important for the teaching profession belong to all three domains: the teaching, the school and the professional domains. It is characteristic that none of the school domain competences was considered as directly important. In the table below, we selected to present the lowest rated competences between 2.26 (item 19) and 2.45 (items 40 and 56). Apart from the competences presented in the table below, other competences valued as indirectly important to the teaching profession can be found in annex 23.

Based on the findings, all groups agreed that knowing about students' family and cultural background is not a prerequisite for secondary education teachers. This is quite surprising, as there is evidence at international level about the benefit of knowing the background of students, considering this highly interconnected with their behavior and performance at school (European Commission, 2007). Research suggests that there is a rather strong relationship between a pupil's socio-economic background and his or her achievements in reading and writing skills: pupils with higher socio-economic status achieve better results. Furthermore, a direct relation between the mother's education and the pupil's results and achievements is established: the higher the mother's education, the higher the pupil's chances of achieving better results (Jariene and Razmantiene, 2006).

Another very important issue not considered as prerequisite for being a good secondary education teacher is helping the social integration of students with learning or behavioral difficulties and organizing heterogeneous groups for students to work together. The lack of realizing the necessity of this may causes difficulties in the implementation of measures already adopted in Bulgaria for mainstreaming students with special educational needs to general comprehensive schools.

According to all informants, competences also involving cooperation with the teaching staff for either determining the desirable rhythm and stages of progress in the training cycle or exchanging ideas about the suitability of pedagogical and didactic options are not significantly important in the Bulgarian context. Furthermore, communicating information relevant to teaching and learning process to students and parents, as well as co-operating with the school staff, with parents, and with the various social agents to achieve the school's educational targets are not determinant for being a good teacher in Bulgaria.

It is worth mentioning that overall the pedagogical dimension of the information and communication technologies was not valued across the groups of respondents. Teachers at secondary schools are not expected to know how to evaluate the pedagogical potential of ICT in order to use it effectively into the preparation and development of teaching-learning activities, classroom management, and professional development. Not having basic knowledge and sensibility towards the benefits arising from computers can be problematic. If is Bulgaria to follow the other developed European countries and align its educational system with those in the rest of Europe, it is indispensable for these actors involved in the education system to be informed and trained on the use of the new technologies.

It is remarkable that none of the groups expects teachers to evaluate its own competences and participate in research aimed at the acquisition of further competences by using available resources. In general, neither administrators, nor educators or the social group realizes the need for the continuous development of teachers' competences and skills by participating in an individual and collective project of professional development.

Finally, it is noteworthy that unanimously all respondents did not consider significant for teachers to know about the national educational policies related to the curriculum, their contractual obligations and the quality management of the teaching-learning process. This is quite astonishing if we recall that the same groups of respondents complained that they have not been informed well in advanced about the curriculum reform and the new measures adopted, and that this impeded their commitment with this reform (see chapter 11.1.2).

TABLE 12.12 MOST AND LEAST IMPORTANT COMPETENCES FOR ALL GROUPS

Item	Most important competences	No of answers
5	Knowing the contents of the subject matter and its relation to other subjects	201
8	Identifying key elements of the subject matter to facilitate meaningful learning for students	199
20	Making it obvious that learning of subject matter is essential	200
21	Establishing a learning environment that invites students to think and act autonomously	201
25	Questioning to engage students in sustained discourse structured around powerful ideas	201
29	Adequate monitoring of student understanding	200
60-65	Communicating clearly and correctly, both oral and written, in the different contexts	198
85	Interpreting student learning difficulties as a challenge to be met	200
87	Encouraging democratic conduct in class, giving students due attention and support	199
92	Avoiding all forms of discrimination by students, parents, and colleagues	200
Item	Least important competences	No of answers
14	Knowing about family and cultural background of students	200
19	Presenting the subject matter in networks of knowledge structured around powerful ideas	132
39	Co-operating with the teaching staff to determine the desirable rhythm and stages of progress in the training cycle	194
58	Using the ICT effectively to set up networks of exchange related with the subject taught and its pedagogical practice	200
56	Evaluating the pedagogical potential of ICT	199
80	Exchanging ideas with colleagues about the suitability of pedagogical and didactic options	201
82	Encouraging colleagues to participate in research aimed at the acquisition of competences set out in the training plan and educational targets of the school	199

Source: Author

NB* The items numbered from:

01 - 65 belong to teaching domain competences

66 - 70 belong to school domain competences

71 - 94 belong to professional domain competences

12.3.3.4 Teachers' qualifications and training needs: responding groups opinions

As we have already explained, the way different actors perceive the role teachers have in secondary education and the qualifications they need to display to perform such role are key for understanding if the Bulgarian society and particularly teachers themselves have understood the benefits of the curriculum reform and are ready to contribute to its successful implementation. To further expand our research and identify teachers' strengths and weaknesses that can either facilitate or hamper the implementation of the curriculum reform, we have asked the 201 informants (see chapter 10.4.2 on informants from questionnaires) to tell us whether they believe that Bulgarian teachers in secondary schools display most of the listed competences in our questionnaire.

From the 197 answers we have received, presented in figure 12.3, overall the 60.9% out of the total number of respondents believe that Bulgarian teachers of secondary schools do not possess most of the listed competences. Examining the results received by responding group, we can clearly distinguish two categories of opinions conditioned by their professional, socio-administrative and political profile.

It is remarkable that those who practically apply the reform, i.e. practice teaching, have a more positive opinion about teachers' qualifications and abilities. In concrete, the majority of teachers (52.3%) and members of the Teachers' Union in Sofia (60%) believe that teachers display most of the listed competences in our questionnaire. Quite close to this opinion are also those who evaluate the teaching process and teachers' abilities, as the 46.90% of experts agree with the above-mentioned informants.

Nevertheless, those who have a more politico-administrative responsibility, having a point of view exterior from the classroom (ministry officials and NGOs), together with those, who prepare students to teach (university professors) and those who are being taught (students) have a more negative opinion. 100% of ministry officials, NGO members and students and 83.3% of university professors think that Bulgarian teachers do not display most of the listed competences related to the teaching profession (see chapter 10.3.2 on rating questionnaires). However, we should not forget that those latter, i.e. the students, have a

subjective opinion as they do not have an expertise on teaching-learning methodologies and they neither possess concrete criteria to fundament their judgments.

The opinion of the members of teachers' unions is conflictive. In our questions if the pre-service and in-service training provided in Bulgaria prepares successfully the teaching force to teach in secondary schools under the new curriculum and needs of the knowledge society, the 100% of teachers unions' members replied negatively (see figures 12.1 and 12.2 in chapters 12.1.2 and 12.2.2 respectively). One could then wonder, if teachers do not receive the appropriate initial training and they neither have the possibility to upgrade their skills through quality continuing training, how they have then acquired, according to the opinion of teachers' unions, most of the key skills and competences needed (see figure 12.3)? Taking in consideration these contradictions generated in the replies of teachers unions' members, we could assume that their opinion is more defensive towards teachers rather than objective.

Teachers on the other hand seem to be able to self-evaluate their strengths and weakness more objectively, as there is convergence between the opinion they have towards the quality of teachers' education and training made available to them (see figures 12.1 and 12.2 in chapters 12.1.2 and 12.2.2 respectively) and the skills and competences teachers have acquired (see figure 12.3). The same turns out for inspectors who evaluate teachers work.

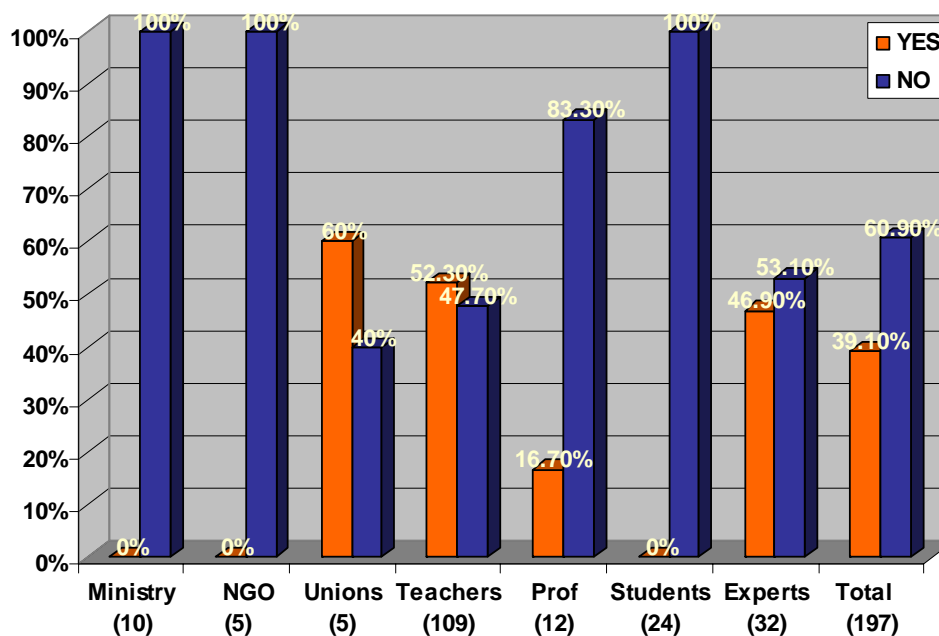
Based on the responses received by ministry officials and their unanimous dissatisfaction with the quality of initial and continuing teachers' training and insufficient qualifications of teachers and trainers (see figures 12.1, 12.2 and 12.3), one would expect to see a drastic strategy towards reforming teachers' education and training system. Investing both financial resources and technical expertise on upgrading teachers' skills should be a priority in the governmental agenda for modernizing the Bulgarian education system. However, as we have seen in chapter 12.2.1, such measures have delayed significantly or there have never been implemented in Bulgaria.

These results, allow us identify gaps between policy and practice, aims of policy measures and abilities to reach such aims. It is clearly shown that there is a mismatch between the

radically new key competences demanded from students under the new curriculum and the teaching skills that teachers are equipped with after their passage through teacher training colleges and in-service training programmes to help students acquire such competences. This conclusion signals for the urgent need to increase the quality of teachers' education provision for upgrading teachers' skills and competences, if the curriculum reform is to be profitable for students.

FIGURE 12.3 FINDINGS ON TEACHERS' QUALIFICATIONS

Do you think that Bulgarian teachers of secondary schools have most of the above mentioned competences?



Source: Author

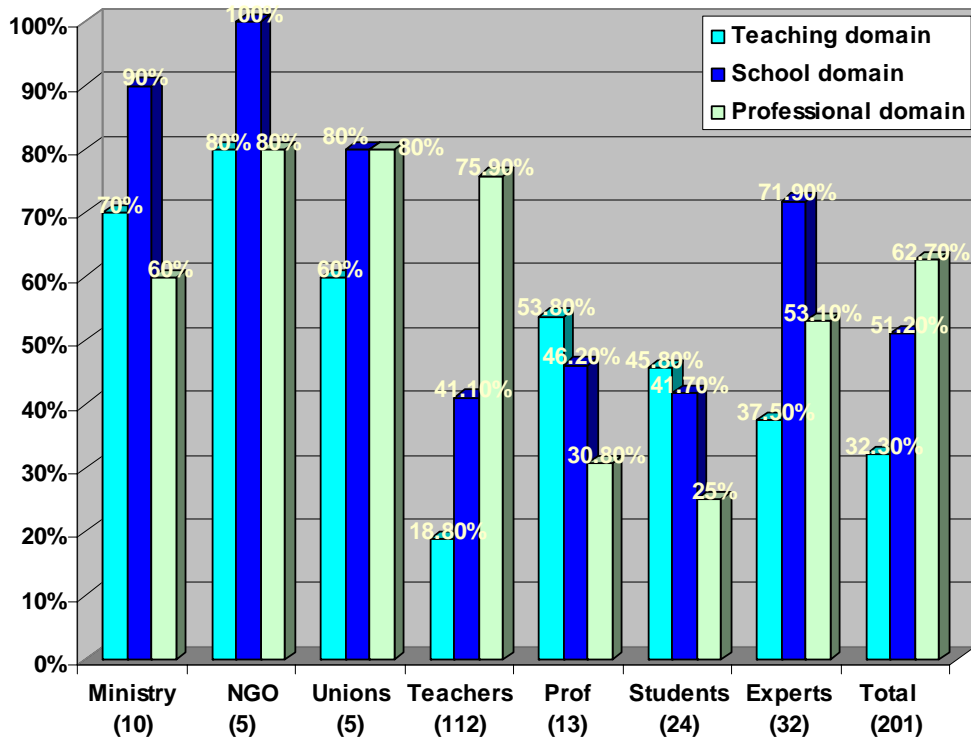
To increase the significance and utility of our findings and to enable us to identify those areas that require immediate intervention if curriculum reform is to be successful, we have asked the different informants to specify in which domain(s) of competences (teaching, school and/or professional domains) they think teachers require further training. We gave the possibility to respondents to choose more than one of the three domain competences.

We received 201 answers based on which, the 62.7% of the respondents believe that Bulgarian teachers are lacking training on *professional domain competences* at first place and at second and third places on *school domain* and *teaching domain competences* (51.2% and 32.3 respectively, see figure 12.4).

The ministry officials (90%), members of NGOs (100%) and the inspectors (experts 71.9% believe that the main weaknesses of teachers are related to competences belonging to the *school domain*. From all informants, only the majority of the university professors (53.8%) and students (45.8%) think that secondary education teachers are lacking training mainly on *teaching domain competences*. Teachers unions identify equally most of the knowledge and skill gaps for teachers in *school* and *professional domains* competences (80%).

FIGURE 12.4 TEACHERS' TRAINING NEEDS BY DOMAIN OF COMPETENCES

In which of the three groups of teaching competencies: teaching domain competences, school domain competences or professional domain competences you think Bulgarian teachers are lacking training?



Source: Author

NB* respondents could choose from more than one domain.

If we compare these results with the importance the informants attributed to the listed competences, we would find a divergence in their opinion. While in chapter 12.3.3.2, we have seen that almost all responding groups gave great importance on competences related to the knowledge of teachers to the subject matter and their ability to transmit such knowledge effectively, the majority of them moreover suggested that teachers should acquire further competences in school and professional domains. This shows that the Bulgarian society is still in transition between the traditional image of teachers who are mere transmitters of knowledge related to their specialization, and the new requirements

arisen from the modernization of the society and its education system, demanding a multidisciplinary and multifaceted role of teachers acting professionally in a dynamic learning environment.

These findings are to be expected in a transitional society such as Bulgaria, which within a short time of period witnessed radical changes in its political and economic aspects. From a communist to a democratic society and from a developing country to new member country of the European Union, the Bulgarian society needs time to assume the changes occurred in all aspects of life. It is very positive though to find out from our survey that the civil society perceives and realizes these changes and the resulted requirements at teacher and student qualifications to bring forward such progressive changes.

PART IV. DISCUSSION OF FINDINGS

The fourth and last part of the study discusses the findings of our investigation. In particular, in chapter 13 we discuss the findings already presented in previous chapters and we draw on the conclusions and contributions of this study in the field of secondary educational policy and administration. Finally, the key messages, perspectives and directions for future research are being presented under the heading: Conclusions and Perspectives.

CHAPTER 13. INTERPRETATION AND DISCUSSION OF FINDINGS

In order to analyze the curriculum reform process in Bulgaria, three areas were examined: the educational content and its organization; the competences that teachers need to display to be able to work with the new curriculum; and the views, opinions and expectations of different stakeholders and actors involved in the process of the curriculum reform. The analysis of these areas allowed us to draw conclusions and to answer the following research questions:

1. whether the curriculum reform was being actually implemented and to what extent;
2. to what extent this reform responds to the expectations and needs of the Bulgarian society and particularly of the actors concerned;
3. if the curriculum reform in Bulgaria is leading to a greater degree of alignment and convergence with the educational systems in the OECD countries;
4. if the curriculum reform in Bulgaria not only facilitates the acquisition of knowledge, skills and competences, but also the ethical and citizenship-building education of students;
5. if there are major obstacles and problems in the implementation process of the curriculum reform which could constrain or preclude the implementation of future reforms in the education sector.

Based on our research, the data collected and analyzed -through the legal and administrative frameworks as well as the opinion of the various actors expressed through in-person interviews and *ad hoc* questionnaires- allowed us to fundament the following conclusions presented in five sections below. Each of these sections presents the main conclusions drawn for the research questions mentioned above.

13.1 DISCUSSION OF 1ST RESEARCH QUESTION

The curriculum reform was implemented from 1999 onwards, within the framework of a broader educational reform. However, significant delays took place and not all the actors concerned received the necessary information or were involved in the design and/or the implementation of this reform.

The reform was designed and decided at central level by the Ministry of Education and Science (MES). The World Bank was the international institution which contributed significantly to the design of this reform providing both financial and technical support (see chapter 11.1.1). The data collected through 96 interviews held with educators, administrators and policy-makers, and civil society representatives in Bulgaria allow us to conclude that the government did not communicate properly and widely to the Bulgarian society the rationale behind this reform and its expected benefits (see chapter 11.1.2). Consequently, there were issues and concrete interventions -such as the introduction of alternative textbooks- which led to conflicts with teachers and other stakeholders, and other cases whose implementation was significantly delayed due to resistance from parents and students; for example, the introduction of an external Matura or secondary school-leaving examination (see chapters 11.3.2 and 11.4.2) .

A systematic effort for reforming the school curriculum was delayed. Several attempts were made to eliminate the ideological bias from the educational content since 1989, upon the transition to democracy in the country; however, only ten years later, in 1999, a new Law was finally passed (MES, 1999g), under which a new curriculum framework was introduced and then progressively implemented throughout compulsory education (see chapter 11.2.4). Moreover, substantial delays were also identified in the implementation of accompanying reforms to support the new curriculum, especially in the fields of student assessment and teachers' training and professional development (see chapters 11.3.1 and 12.2.1). The planned reforms in these two areas have not been yet introduced despite the fact that eight years have elapsed since the new curriculum started to be rolled out. Furthermore, delays have been observed in the production of new school textbooks based on the new curriculum (see chapter 11.4.1).

On the other hand, changes have been introduced in the education system without the endorsement and support of a legislative framework which could ensure transparency and also provide support to teachers in the application of the new measures (see chapter 11.2.4). The two most representative examples of these gaps and lack of coordination are presented below.

As stated already, a new national curriculum was adopted in 1999 based on new National Education Standards. While the new curriculum is oriented towards the development of skills and competences on the part of students, the assessment system remained unchanged and thus inadequate to support, assess and guide the expected outcomes of the new curriculum. National Assessment Standards linked to the new curriculum have not been introduced yet (see chapter 11.2.1). In 1993, the possibility was opened for secondary education teachers to choose among alternative textbooks. However, the new textbooks arrived at the very last moment in schools, right before the start of the academic year, and without instructions or suggestions for teachers to know how to choose the most adequate one based on the characteristics of their school and students. Only six years later, in 1999/2000, the Ministry of Education and Science adopted the National Education Requirements for Textbooks and Teaching Materials, as well as the Rules and Conditions for Assessing (MES, 2001b). Two years later under an amendment of the National education Act, the number of alternative textbooks was limited to three as an attempt to regulate the market and control the chaos created in schools (see chapter 11.4.1).

13.2 DISCUSSION OF 2ND RESEARCH QUESTION

The secondary education curriculum reform was necessary in Bulgaria in order to promote and consolidate the radical changes occurred in terms of political democratization and economic development, as the country evolved from being a transition state into a full member of the European Union (World Bank, 2000a).

From the 96 interviews conducted with stakeholders in the education sector and with representatives from the overall Bulgarian society, we can conclude that citizens have understood the need for an education reform within the framework of socioeconomic changes occurred at national level, as well as the need to align their education system with those of the western countries of the European Union.

However, our data suggest that the reform was not responsive enough to the needs of the key actors involved in its process: the teachers. The replies received in our questionnaire proved that our informants, in their majority, are not satisfied with the current provision of teachers' education and training (see chapters 12.1.2 and 12.2.2, figures 12.1 and 12.2). The different groups of respondents unanimously believe that teachers do not possess the necessary and adequate skills and competences for implementing successfully the curriculum reform, i.e. teaching the new curriculum (see chapters 12.3.3.4 and figure 12.3). This is due, based on their opinion, to the inadequate pre-service training of teachers as well as to the few opportunities available for access to quality in-service training and professional development.

It is well known that education reform cannot succeed when its cadre of teachers are ill-prepared for change, overly underpaid, inefficiently used, inadequately trained, and inadequately supported in terms of in-service training, access to teaching materials, and basic conditions for teaching, learning, and research. Thus, improving the quality of teacher education in Bulgaria should become a priority in the political agenda of the Ministry of Education and Science.

13.3. DISCUSSION OF 3RD RESEARCH QUESTION

The components of the curriculum reform in secondary education in Bulgaria converge with reforms taken place in education systems of the EU countries which promote competences-based curricula, diversification and flexibility in the organization and selection of curriculum contents and subjects, as well as the introduction of new concepts and social values in the curriculum.

The present study provides evidence that most of the OECD countries began addressing issues of curricula review and reform at least since early 80s, while this process has been delayed in transitional countries of the Balkan region (such as Bulgaria, Romania, Albania, Croatia, Former Yugoslavian Republic Of Macedonia, etc.) affected by radical political and social changes (see chapter 3).

Regardless of the differences in the period of time when those reforms were implemented, it is observed that the curriculum policies in the Balkan countries, and especially in Bulgaria, are aligned with those of the developed OECD countries. In both groups of countries curriculum reforms are being implemented targeted to the:

- a) development of new syllabi in order to incorporate new knowledge areas, skills and competences to the curriculum, such as ICT, economics, civic education, vocational education, life skills, and guidance and counselling;
- b) actualization of the curriculum subjects and educational content with new concepts and values, demanded by emerging critical issues in modern society. For example, sustainable development is being studied through *Geography*, health education through *Physical education*, new social values, life skills and civic education through *History* and *Geography*;
- c) introduction of new objectives and educational content which go beyond national borders offering a European and international perspective and dimension. It is important for example that *Geography* and *History* curricula aim to fight against international stereotypes and conflicts and reinforce the need for mutual understanding and living together peacefully;

- d) reorganization of curriculum content to rebalance the time assigned to different subjects and knowledge areas, increasing flexibility and diversification and allowing interdisciplinarity.

These general trends of secondary curriculum reforms are common to the political agendas of both OECD and Balkan governments, but of course the degree to which these content changes have been actually introduced differs by country. Despite the new ambitious aims of secondary curriculum subjects in both developed and transitional countries, it is still not known to what extent social studies and humanities curricula are designed in a way that can help to promote intercultural education and social inclusion in the daily life in secondary schools.

In Bulgaria, *History* and *Geography* in secondary education have been revised to promote social inclusion and tolerance (see chapters 3.4.1, 3.4.2, 8.3.1 and 11.2.2). Special importance is given in this educational level to the teaching of *Civic education* enhancing the principle of European citizenship through humanities and social studies (see chapter 3.4.3). A rich gamma of foreign languages is offered in the new study plans with teaching methods based in the Common European framework for learning, teaching and assessing languages (see chapters 3.5.2 and 8.3.2).

For the first time in the history of the Bulgarian education, new National Education Standards for curriculum content in all subjects were adopted (MES, 1999f), establishing the criteria and conditions based on which students should acquire and develop skills and competences through the new curriculum (see chapter 11.2.1). The new curriculum is not anymore a mere list of individual subjects but it is structured in eight broad and well defined areas. This allows for establishing links between related subjects, increasing in this way the flexibility and inclusiveness of the curriculum from the perspective of both teachers and students. Schools, for first time, have the right to adapt the national curriculum to their local needs (School Based Curriculum) and students can choose new subjects or deepen their knowledge in the subjects of their interest (see chapters 8.3 and 11.2.3).

In 1993, the textbooks market was opened without constrained. The textbook is no longer the Bible of the teacher and the market provides different alternatives. Again for the first

time, teachers may choose the most adequate textbook for their school and students. This gives the opportunity to teachers to adapt teaching methods and their choice of curriculum subjects to the needs of their students.

These reforms have contributed to the democratization of Bulgarian education system and its convergence towards the European standards.

13.4 DISCUSSION OF 4TH RESEARCH QUESTION

In addition to the incorporation of new knowledge, the curriculum reform should also contribute to the development of an ethical attitude and the citizenship skills of students. To achieve this goal, it is indispensable not only that the school curriculum promotes ethics and citizenship rights and obligations but also that the school functions as an exemplary democratic social community.

From the data collected through the questionnaires distributed across Bulgaria, it was made evident that the majority of the informants do not quite perceive the school as a small social community where the participants should collaborate. Only two among the seven groups of respondents,¹⁰⁵ the teachers' unions and the NGOs, clearly emphasize the value of teacher competences that belong to the school domain. Only one group, teachers' unions, perceives the need for the cooperation of parents, teachers and other social agents in order to accomplish the educational goals of the school (see table 12.4). From the findings of our study, it can be claimed that there is a clear tendency to see teaching and learning as an individual activity limited to the walls of the classroom. Based on the low importance given to general competences related to the socialization and collaboration, the Bulgarian society did not seem to be aware of the need for both teachers and students to acquire competences

¹⁰⁵ The seven groups of respondents who replied to our questionnaire are: ministerial staff, members of NGOs, members of teachers' unions, secondary education teachers, university students, professors of the university and inspectors.

such as team work, collaboration, open exchange of ideas, peaceful conflict resolution and transformation, all of them nowadays absolutely necessary for every citizen.

Policy-makers, students and university professors do not consider a priority for teachers to display professional competences which would allow them to act in a critical and ethically responsible way while carrying out their duties (see table 12.4). The professionalization of the teaching profession becomes a priority in many European countries and constitutes also an objective of the Lisbon strategy. Undoubtedly, policy makers, as well as the university professors who train teachers, should see the necessity for including such competences in the curricula of teachers' pre-service and in-service training. It is known that only if teachers show an ethical awareness, students may also develop similar competences, necessary to live together peacefully in our modern society.

The students who replied to our questionnaire do not think that one of the main functions of teachers should be the supervision of student behavior in the classroom and in the school at large. It does not come as a surprise that secondary school students have this resistance to acknowledge teachers as controllers of discipline at schools. On the other hand, while there is unanimous agreement among the respondents to our questionnaire on the need to motivate students to work and live together in the classroom, only the teachers and the inspectors recognize the need to communicate to students the norms of good behavior in school and to ensure that they adopt an appropriate social attitude (see annex 23, items 43-46). This probably points to the lack of awareness on the part of the rest of the stakeholders with respect to the increasing difficulties to maintain discipline and prevent antisocial behavior in today's schools.

Only students appear to be sensitive with regard to the social integration of students with special education needs. It is remarkable that of all the different informants, they are the only group who understands how important is for teachers to know and be able to work with diverse and heterogeneous classrooms creating an appropriate and beneficial environment for all. It is necessary that this is understood by the whole civil society, but mainly by the teachers.

All informants recognize the need and importance to promote a democratic attitude in the classroom giving to students due attention and support and allowing for different opinions to be expressed (see annex 23, items 87 and 88). This is a positive point for implementing the reform successfully.

All informants recognize the need and importance to communicate efficiently and appropriately with teachers, students and parents (see table 12.4 point 7). This is a strong feature of the Bulgarian education community in terms of promoting and ensuring democratic values and principles in the classroom, thus facilitating the implementation of the curriculum reform. However, for certain groups, such as NGOs, teachers' unions, university professors (see tables 12.6 and 12.8 item 80, table 12.7 items 39 and 40, table 12.9 item 46), students (see table 12.10, items 39, 40, 69) and inspectors (see table 12.11, item 39), this need for communication is limited to certain specified duties. Furthermore, Ministry officials (see table 12.5 items 34 and 42), NGO members (see table 12.6 items 23 and 67), teachers' unions (see table 12.7 item 42) and university professors (see table 12.9 items 42, 67 and 68) believe that students and parents should not necessarily communicate and be involved in the design of the learning process. It is important that all stakeholders understand the benefits that communication and collaboration with students and their parents can bring for identifying needs and increasing the relevance of the educational process.

13.5 DISCUSSION OF 5TH RESEARCH QUESTION

Progress made on the curriculum reform up to this point allows us to state that there may be problems in successfully achieving its goals because of the generalized lack of understanding towards certain preconditions such as collaboration, team work and teaching in a professional way. The analysis of the data collected both through the individual interviews and questionnaires shows the following problematic areas:

There is no convergence in the different actors' opinions on basic issues, such as the roles and responsibilities of secondary education teachers. Each group of respondents perceives the responsibilities and functions of teachers in a different way based on their own interests and needs. This could result in difficulties in terms of building consensus on key areas when it comes to both decision-making and implementation. Different stakeholders attribute more or less importance to different competences and stress very different areas for teacher training and professional development needs. These different points of view and lack of consensus alert for potential problems in the conception and introduction of new approaches to teacher training.

The motivation to use new technologies in the teaching-learning process was very low in Bulgaria according to our data. Ministry officials (see annex 23, items 55-59), teachers (see table 12.8 items 55, 56 and 58), inspectors (see table 12.11 items 55-58), members of NGOs (see table 12.6 item 59) and students interviewed (see table 12.10 items 55-59) do not believe that it is overly important for teachers to display competences related to the introduction of new technologies (ICTs) into the preparation and development of teaching-learning activities. Only university professors (see annex 23, items 55, 56 and 59) and teachers' unions (see table 12.7 item 57) showed certain sensibility towards ICTs but none of them recognized the need for teachers to know the pedagogic potential of ICTs (see table 12.7 items 55 and 56). Failure to acknowledge the potential benefits of new technologies in the educational process has been detected through our study and it can be a major weakness with regard to the capacity of the actors involved in the education system. This lack of knowledge and motivation both on the part of those who make decisions, as well as of those who teach and of those who learn may impede the implementation of measures oriented

towards the use of new technologies in schools and the modernization of the education system. Thus, the urgent need to inform and educate the Bulgarian society on the use of new technologies as a promising didactic instrument becomes obvious from the findings of our study.

This need has been recognized by the Bulgarian government who made a considerable effort since 2005, through the National Strategy for the Introduction of Information Technologies in Bulgarian Schools (2005-2007), to equip teachers with basic skills on the use of ICT and the introduction of computers in the teaching process (World Bank, 2007a). In May 2007, the Council of Ministries adopted an updated plan of action for the implementation of this strategy, and the current year, 2007, the MES is preparing a second strategy for Education and ICT (2008-2013).

None of the informants considered indispensable the action-research approach in the teaching profession as a means for the development of teachers' knowledge, skills and competences (see annex 23, item 82). This lack of awareness may also result in a bottleneck for the modernization of the Bulgarian education system and its alignment with European standards. The European Commission in its Communication for Improving the Quality of Teacher Education, based on the Common European Principles for Teacher Competences and Qualifications (European Commission, 2007), highlights that teachers should be encouraged to review evidence of effective practice and engage with current innovation and research to keep pace with the evolving knowledge society. In a context of autonomous lifelong learning, their professional development implies that teachers undertake classroom-based research and incorporate into their teaching the results of classroom and academic research.

Five out of the seven groups of informants (ministry officials, teachers, university professors, inspectors and students) do not consider overly important for teachers to acquire competences related to the adaptation of teaching practice student diversity (see table 12.4 point 5). These findings suggest that the majority of our informants are not sufficiently sensitive about the principles of personalization and solidarity in teaching and learning. Teachers should be able to work with students with special education needs and students of

different economic and social backgrounds and nationalities for the integration and mainstreaming of such students in public comprehensive schools. Taken into consideration the significant number of minorities, as the Roma, and other disadvantaged groups who live today in Bulgaria, it becomes vital to educate citizens on the importance of helping and living together.

The evidence gathered in this study suggests that, as in other European countries, the professional status of teachers is not broadly acknowledged in Bulgaria as this entire domain of competences has not been particularly valued by the different actors (see chapter 12.3.2). It is subject matter knowledge which still retains a privileged consideration in the frame of mind of all actors in the education community, as the type of knowledge teachers should master and be qualified in. Special emphasis should be given to increase the awareness towards the professionalization of Bulgarian teachers and the need to perform their role in a professional and ethical way. Moreover, there is a clear need to motivate teachers to participate in projects of professional and personal development through continuous training. The answers received from 201 informants reveal that our informants do not acknowledge as a priority the professional development of teachers (see chapter 12.3.3 and table 12.4), given that none of the responding groups deemed as necessary the participation of teachers in professional development activities (see table 12.4). This is particularly worrying at a time when a curriculum reform is being implemented.

Finally, the role of teachers as evaluators and the competences that they should display in terms of objectively assessing students' learning progress are well accepted by all groups of informants except for students (see annex 23, items 35-37). Once again, it is not surprising that secondary school students manifest their rejection to this teachers' role, also manifested with their strong resistance against the establishment of an objective external school-leaving exam (see chapter 11.3.1).

CONCLUSIONS AND PERSPECTIVES

Education and training has been recognized as a powerful policy lever to achieve the strategic goal of the Lisbon strategy: to make Europe the most competitive knowledge-based economy and a socially cohesive society by 2010 (European Council, 2000).

To support this endeavour and respond to the emerging needs of the global labor market for new skills and competences, European countries are making a big effort by increasing access to education for all children and strengthen the quality of the education process. Curriculum reform is included in the political agenda of many countries as a priority area for achieving this goal.

Bulgaria, since the change of the regime, made a considerable effort to democratize and modernize its educational system. A systematic curriculum reform took place progressively in all levels of education bringing Bulgarian's educational system closer to those of the occidental countries.

It is well know though that traditional ways of thinking and habitual modes of procedure do not change overnight. New challenges and aspirations arisen from the knowledge-based society call forth new energies but it is also to be expected that tensions and apprehensions will exist as the old order yields place to the new.

Based on the findings of this study, the practical implementation of the secondary curriculum reform in Bulgaria faced some very important challenges consisting in:

- weaknesses in effectively communicating the rationale behind the reform to the public and enhancing awareness on its expected benefits;
- multiple and frequent Cabinet changes and lack of institutional memory within the Ministry of Education and Science (MES), thus failing to ensure the continuity of the planned reforms;
- insufficient inter-institutional cooperation and coordination both in terms of decision-making as well as with regard to the implementation phase of the reform;
- lack of consistency in the legislative and regulatory framework to introduce coordinated and mutually reinforcing measures that could support the curriculum reform;

- Lack of financial and professional incentives to motivate teachers to actively participate in the education reform;
- Slow implementation of the complementary reforms and measures required to support the successful implementation of the new curriculum:
 - limited access and opportunities given to teachers for quality in-service training and career advancement;
 - delays in the development and implementation of an external national assessment system adequate to assess and monitor the outcomes of the new curriculum;
 - complex and unclear textbook selection procedures and delays in the preparation of new textbooks to deliver the new education content;
 - delays in aligning the inspection system to the new needs and developing the National Framework for Inspection as a sustainable monitoring mechanism for quality.
- Lack of capacity to evaluate the impact of the curriculum reform on the quality of secondary education.

In short, several delays occurred in implementing the complementary reforms that should have accompanied the introduction of new curricula and educational standards in secondary schools.

As stated above, a curriculum reform can not be successful if supportive measures in all the areas affected by such reform are not addressed effectively. Students' evaluation and assessment is highly interlinked with changes occurred in the way the curriculum is being designed and delivered. Changes in the curriculum, particularly if they are substantial and far-reaching, require parallel changes in the student assessment system, both at the school and the national levels. In Bulgaria, however, the curriculum reform was under implementation years before the student assessment capabilities were even planned, let alone implemented. Assessment and curriculum change must evolve interactively, with assessment evidence pointing to the necessary reviews in the curriculum and helping to identify new goals and priorities.

Changing the educational content also implies an immediate change in the tools that deliver such content, that is school textbooks and other teaching and learning materials. Moreover, in order to both monitor and support the reform, school inspection has a key role to play.

The lack of harmonization of the new educational content with adequate teachers' training, students' assessment, school inspection and textbook practice can undoubtedly create a mismatch among the intended, delivered and achieved curriculum. This gap between theory and practice and between legislative intentions and actual institutional capacity may have significantly decreased the potential positive impact of the curriculum reform on the quality of secondary education in Bulgaria.

For the secondary education reform to be effective, i.e. for it to impact positively on building the personal competences of future citizens and their smooth transition from school to work and labor market insertion, the involvement and synergy of all actors concerned is required. Moreover, it is necessary to increase the awareness of the Bulgarian society towards those areas that have been identified as problematic in this study.

In particular, all actors concerned should be well informed about the benefits of the new technologies in pedagogy, while the quality of teachers' education and training should be reinforced and improved focusing on ICT and student-centered teaching methods.

Teachers should understand school as a representation of the society where they should act ethically and responsibly sharing knowledge and contributing to its best function. Special attention should be given in the development of competences, both to teachers as to students, on one hand on team-working and on the other, on the understanding and incorporation of values of tolerance, democracy, collaboration and solidarity. Adapting teaching to students' diversity and helping the social integration of students with learning or behavioral difficulties should become an integral element of teacher education programmes.

Despite all the good intentions of the Bulgarian government to reform and modernize the education system, the Government's strategy in primary and secondary education approved by Parliament in June 2006 (MES, 2006), states that the main challenges in primary and secondary education systems are the decrease in the quality and relevance of skills taught

and a decline in participation rates, particularly in upper secondary level. The deteriorating quality of education is often illustrated with examples such as the increasingly poor social status of teachers and the broken link between school and family environment, institutions and society.

The decline in quality may also be related to the slow pace of implementation of the ongoing, and much needed, reforms, both in terms of content and teaching methods, and in terms of finance and governance, which needs to be optimized to reflect new demographic, economic and social conditions, and to ensure efficient resource allocation.

Accession to the European Union has changed the benchmark against which Bulgaria's performance is measured. The lag in many social indicators is now more evident than before and requires decisive action in those areas which will affect the productivity of the work force, the efficiency of public spending, the inclusion of minorities, and regional disparities. To address these challenges, the Government aims to increase the access to education for all children and strengthen the quality of the education process. To achieve these two goals, the Government's strategy for primary and secondary education 2006-2015 has identified six broad objectives (MES, 2006):

- Orienting school education towards the stimulation of thinking and independence, towards the formation of practical skills and towards personality building;
- Establishing an efficient internal assessment system through the wide-scale use of tests and introduction of a system for national standardized external assessment;
- Decreasing the number of drop-outs and increase enrollment rates for children in the compulsory schooling age;
- Strengthen the authority and improving the social status of the teacher;
- Decentralizing the school network through the gradual introduction of delegated budgets for all schools and providing more flexibility to municipalities to appoint school directors; and

- Optimizing the school network by introducing a single standard (per capita) financing formula and putting in place a system of financial incentives for the closure of ineffective schools.

Bulgaria did not have the capacity to supervise and monitor education quality systematically and an impact study on the curriculum reform has not been conducted yet (World Bank, 2007a). The present study gave the opportunity to different stakeholders and the civil society to raise their voices. Our analysis of implementation policies and strategies of the secondary curricula reforms in Bulgaria helps identify good practices and draw lessons from the shortcomings of policies and implementation strategies, which in turn can be used during the implementation of ongoing and future reforms. It highlights the most important gaps and gives the possibility to decision-makers to direct their efforts in the right orientation. The capacity of practitioners to learn from the results and the capacity to make evidence-based policy choices could really make the difference in Bulgaria.

The collected data in the current investigation and the conclusions drawn could contribute to fundament the guidelines for the national policy on teacher training and professional development currently being discussed, thus allowing for different actors involved to have a clear and precise idea on the expected competences for secondary education teachers.

Finally, this study, beyond being useful in terms of updating information and monitoring the current process of reforms in Bulgaria, can also be used for orienting future processes that may take place in other Balkan countries and countries in East Europe.

LIST OF ABBREVIATIONS

AEEE: Association of European Economics Education. <http://www.aeee.dk/>

ASIARP: Association for Social Investigations and Applied Research Practices. <http://www.asiarp-bg.org/>

BIA: Bulgarian Industrial Association <http://www.bia-bg.com>

CEDEFOP: European Centre for the Development of Vocational Training www.cedefop.europa.eu/

CEPS: Centre for European Policy Studies www.ceps.be

CSBSC: Center for the Study of Balkan Societies and Cultures <http://www-gewi.kfunigraz.ac.at/cbsc/>

EC: European Commission: <http://ec.europa.eu>

EURYBASE. The information database on Education systems in Europe. http://www.eurydice.org/portal/page/portal/Eurydice/DB_Eurybase_Home

EURYDICE: The Information Network on Education in Europe www.eurydice.org

IBE: International Bureau of Education www.ibe.unesco.org

IEA: International Association for the Evaluation of Educational Achievement

IIEP: International Institute for Educational Planning <http://www.unesco.org/iiep/>

INCA: International Review of Curriculum and Assessment Frameworks Internet Archive <http://www.inca.org.uk/>

NSI: National Statistical Institute of Bulgaria www.nsi.bg

MES: Ministry of Education and Science, Sofia, Bulgaria www.minedu.government.bg/

OECD: Organization for Economic Co-operation and Development www.oecd.org

UNDP: United Nations for Development Programme <http://www.undp.org/>

UNESCO: United Nations, Scientific, and Cultural Organization www.unesco.org

WB: World Bank www.worldbank.org

WCER: Wisconsin Centre for Education Research <http://www.wcer.wisc.edu/>

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ANNEXES

ANNEX 1. STUDY PLAN AND CONTENT FOR BULGARIAN LANGUAGE AND LITERATURE FOR 9TH GRADE (1997)

Compulsory content	Indicative content for elective classes or classes in profile-oriented schools
36 school weeks, 3 class hours per week	36 school weeks, 1 class hour per week
Bulgarian Language and Western European Literature	
Styles in written Bulgarian language. Scientific and academic writing. Genres.	Genres: bibliographical description, annotation, comment, criticism
European Renaissance Renaissance Literature Cervantes Don Quixote	Petrarch Canzoniere Boccaccio Decameron Dante Alighieri Inferno
Text. Elements of a text. Communication and texts. (revision of already studied content with new additions and extensions) Logical unity of texts Linguistic unity in a text. Scientific writing. Literary texts Literary and academic writing	Communication. Speech etiquette.
Shakespeare Hamlet Written assignment on “Hamlet” Discussion on the genre and composition consistency in a text (based on the students’ written assignments)	Shakespeare Sonnets, Macbeth, Midsummer night’s Dream, Romeo and Juliet (one of the above, as chosen by the teacher)
Classicism in literature Moliere, Tartuffe or Corneille, Cid (as chosen by the teacher)	Works by the following authors, as chosen by the teacher: Denis Diderot, Johann Goethe, Victor Hugo, Heinrich Heine, P. B. Shelley, George Byron, Honore de Balzac, Guy de Maupassant, Charles Dickens
Bulgarian Language and Russian Classical Literature	
Pushkin Poems or “Eugene Onegin” Gogol “Dead Souls” or “St. Petersburg Stories” Dostoevski A novelette as chosen by the teacher Chekov Short stories	Lermontov “A Hero of Our Time” Gogol A play as chosen by the teacher Dostoevski “Crime and Punishment” Turgenev “On the Eve” Tolstoy “War and Peace” or “Ana Karenina”
Bulgarian Renaissance Literature	
The Bulgarian Renaissance: timeline and periods Key events and phenomena in the development of Bulgarian culture and literature. Special national features	
Paissii Hilendarski	Paissii Hilendarski

<p>Slav-Bulgarian History Sofronii Vrachanski Life and Suffering of Sinner Sofronii</p> <p>New Bulgarian poetry. The poetry of Dobri Chintulov Petko Slaveykov Public activity and political journalism Intimate and social poetry Humoristic and satirical works The advent of new Bulgarian theater and drama Dobri Voynikov The Misunderstood Civilization Luben Karavelov Public activity and political journalism “Bulgarians of Old Times”</p> <p>Hristo Botev Public activity. Political journalism. Tropes and figures</p> <p>Writing official, administrative and business texts. Genres. Application. Professional CV. Letter of recommendation. Letter of authorization. Declaration. Minutes.</p>	<p>Slav-Bulgarian History Sofronii Vrachanski Life and Suffering of Sinner Sofronii The advent of new Bulgarian poetry. Links between folklore and literature in the Renaissance period. First poets.</p> <p>Folklore and Dobri Chintulov’s rebel songs Petko Slaveykov Political journalism (work as chosen by the teacher) Links between folklore and literature in his poems</p> <p>Vassil Drumev Ivanko Luben Karavelov Political journalism (work as chosen by the teacher) Links between folklore and literature in Karavelov’s works</p> <p>Hristo Botev’s poetry in the context of the national folkloric tradition. Bulgarian literary criticism in the Renaissance period</p> <p>Writing official, administrative and business texts. Genres.</p>
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Source: MES, 1997b. Official Document. Bulgaria

Notes:

1. The content in the left column is compulsory for all schools.
2. The topics to be studied in elective and profile-oriented classes are chosen by the teacher. In making such choices teachers may rely on the non-compulsory content included in the textbooks, but are also allowed to use other teaching materials they see fit.

Oral and written examination:

- Literary and academic writing
- Analysis of a given literary text
- Comments and discussion of a general cultural, social, or ethical issue

Knowledge and skills for rationalizing literary works

Knowledge of and ability to understand concepts such as:

- Renaissance, Classicism, Romanticism
- Character in a literary work
- Novel, novelette, elegy, pamphlet
- Drama, comedy
- Tropes, figures

ANNEX 2. CURRICULUM FOR BULGARIAN LANGUAGE FOR 9TH GRADE (2003)

1	2	3	4	5	6
Core content	Expected results in view of the overall curriculum	Expected results in each topic	New concepts introduced	Context and activities	Interdisciplinary links
Core 1: Socio-cultural competencies	Standard 1: <ul style="list-style-type: none"> The student is able to use adequately different language registers The student is able to identify the specifics of different texts: academic, scientific, media, artistic, civic and institutional The student has knowledge of the structural, compositional, and linguistic characteristics of texts, typical of different types of communication. 	Students must master: Topic 1: Text and socio-cultural context <ul style="list-style-type: none"> components in a communicative situation – participants, objective, topic, subject, conditions the function of texts in communication; intention and tasks of communication. Topic 2: Texts in inter-personal communication <ul style="list-style-type: none"> specifics of interpersonal communication spheres of interpersonal communication: communication in the academic, media, civic, institutional, and artistic sphere. 	socio-cultural context interpersonal communication civic and institutional sphere function of texts – purpose and pragmatism	Students are given the opportunity: <ul style="list-style-type: none"> to monitor, analyze, and participate in different communicative acts and situations of public communication 	<ul style="list-style-type: none"> The knowledge and skills on text specifics and communicative functions develop students' ability to understand, interpret, and produce texts in all other subjects included in the curriculum. The knowledge and skills on the socio-cultural context and the spheres of interpersonal communication integrate the course in Bulgarian language and literature into the overall interdisciplinary subject area of Civic Education.
Core 2: Language competencies	Standard 1: <ul style="list-style-type: none"> The student is able to choose the right language and figures of speech for different types of communication The student has knowledge of the lexical and grammatical characteristics of the language and is able to use them properly to convey specific meanings 	Topic 1: Unity of language and purpose in a text <ul style="list-style-type: none"> link between types of communication and texts as a unity of language and purpose Topic 2: Use of linguistic means for structuring meaningful texts <ul style="list-style-type: none"> linguistic means denoting the subject and topic of a text linguistic means denoting the characteristics of an object linguistic means denoting 	coherency and elements in a text text – micro text topic – micro topic nominative chain	<ul style="list-style-type: none"> to analyze selected texts based on their characteristics 	<ul style="list-style-type: none"> The knowledge and skills on the use of appropriate language in different spheres of interpersonal communication serve all other subjects included in the curriculum.

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1	2	3	4	5	6
		<p>events</p> <ul style="list-style-type: none"> • linguistic means denoting circumstances <p>Topic 3: Repeated use of linguistic means in a text</p> <ul style="list-style-type: none"> • repetition as a mechanism for structuring texts and conveying messages • repetition as a rhetoric approach designed to impact the addressee • repetition as a stylistic device • repetition as a stylistic deficiency <p>Topic 4: Choice of linguistic means in view of the styles used in different spheres of communication</p> <p>Topic 5: Choice of text composition and structure in view of the styles used in different spheres of communication</p>		<ul style="list-style-type: none"> • to find and use articles of topics of interest 	
<p>Core 3: Socio-cultural and language competencies in oral communication</p>	<p>Standard 1:</p> <ul style="list-style-type: none"> • The student is able to structure a comprehensive statement on a given topic; • The student is able to develop a meaningful and well-structured statement on a given topic <p>Standard 2:</p> <ul style="list-style-type: none"> • The student is able to stick to the rules of spoken language when making public statements 	<p>Topic 1: Public statement on a topical issue in a chosen sphere of communication</p> <ul style="list-style-type: none"> • ability to set a topic and stick to it • ability to make a point • ability to structure a coherent statement • ability to choose an appropriate style <p>Topic 2: Specifics of making a public</p>		<ul style="list-style-type: none"> • to independently structure public statements or speeches on a chosen topic 	<ul style="list-style-type: none"> • The ability of the students to speak coherently on a given issue or topic serves all other subjects included in the curriculum.

Annexes

1	2	3	4	5	6
		statement or speech • intonation and logical stress			
Core 4: Socio-cultural and language competencies in written communication	Standard 1: • The student is able to structure written texts independently (in the style of newspaper articles or essays) • The student understands the role of arguments, descriptions and narratives in a written text and is able to use them in view of the communicative task. • The student knows the rules of spelling and punctuation and is capable of organizing written texts.	Topic 1: Specifics of writing a well-structured text, knowledge of the structural components in a text (topic, thesis, arguments) Topic 2: Specifics of newspaper articles and essays as argumentative texts Topic 3: Structure and composition of a newspaper article: • ability to divide a text into thematic elements and to develop a similar text independently • ability to establish a logical link between the elements of a text Topic 4: Structure and composition of an essay on a given literary work: • ability to choose the appropriate arguments • ability to select an appropriate composition independently • ability to choose the right wording and style to achieve expressiveness Topic 5: Spelling and punctuation rules: • punctuation of sentences with complex syntax • ability to choose synonyms to avoid repetition • punctuation marks	communicative task argument conclusion argumentative techniques text coherence logical links structure composition expressiveness and stylistic use of punctuation	• to familiarize themselves with sample texts in the style of newspaper articles or essays • to participate in contests and competitions with their own texts	• The ability to produce a well-structured and well-founded written text is fundamental for the students' capacity to write texts for all other subjects included in the curriculum.

Source: MES, 2003d. Official Document. Bulgaria

ANNEX 3. CURRICULUM FOR LITERATURE FOR 9TH GRADE (2003)

1	2	3	4	5	6
Core content	Expected results in view of the overall curriculum	Expected results in each topic	New concepts introduced	Context and activities	Interdisciplinary links
Core 1: Socio-cultural competencies	<p>Standard 1:</p> <ul style="list-style-type: none"> The student understands the role of ancient civilizations as a basis for a universal system of values <p>Standard 2:</p> <p>The student realizes the role of Christianity in the development of the European cultural model</p>	<p>Students must master:</p> <ol style="list-style-type: none"> The link between the cosmos, the community and the individual The key tales of the Antiquity: <ul style="list-style-type: none"> the tale of Prometheus the tale about the curse of the House of Atreus the story of Oedipus the story of Moses the story of Joseph and his brothers <p>Students must master:</p> <ol style="list-style-type: none"> Christian ethical norms The impact of Christianity on the development of the European cultural model 	<p>cosmos, community, man, common good</p> <p>Christian ethical norms love forgiveness sacrifice</p>	<p>Students are given the opportunity:</p> <ol style="list-style-type: none"> To comment on the studied works, analyzing the main moral conflicts and making a reference to modern ethical norms. To identify intransient values and norms in the tales of the Antiquity To comment on the influence of ancient ethical norms on the subsequent development of European societies. <p>Students are given the opportunity:</p> <ol style="list-style-type: none"> To comment on the model of behavior embodied in biblical stories To comment individual evangelical texts in which Christian ethical norms are best presented. To identify the impact of Christianity on the subsequent development of the European civilization 	<p>The content in literature, complemented with the content in history and philosophy, gives students the opportunity to acquire a comprehensive idea of the moral and ethical norms in the Antiquity and their role for the development of European culture and spirit.</p> <p>The content in literature, complemented with the content in history and philosophy, helps students understand the role of Christianity in the development of the European moral values.</p>
Core 2: Literary competencies	<p>Standard 1:</p> <ul style="list-style-type: none"> The student has systematic knowledge on the structure and the function of a literary work, can make in-depth analysis of the literary works studied and is able to use literary theory and terminology properly. 	<p>Students must master:</p> <ol style="list-style-type: none"> The role of literature in the development of human societies and cultures The chronology in the development of different types of literature over time The specifics of myths, legends, songs, and fairy tales. 	<p>myth, folklore, literature, folkloric genres, ancient literature, epic, epos, lyric, tragedy, genres in Medieval literature</p>	<p>Students are given the opportunity:</p> <ol style="list-style-type: none"> To familiarize themselves with the different expressions of human literary endeavors over time To understand the difference between spoken and written language 	

Annexes

1	2	3	4	5	6
	<p>Standard 2: 1. The student is familiar with the different stages in the development of European culture and literature</p> <p>Standard 3: 1. The student is familiar with the development of European literary history based on the works, included in the compulsory content: - Homer, The Iliad - Lyric poetry in the Antiquity - Sophocles, Oedipus Rex and Antigone - Euripides, Electra - St. Mathew's Gospel - St. John's Gospel - Medieval tales of chivalry, The Arthur Cycle</p>	<p>4. The structure and function of ancient literature 5. The structure and function of Medieval literature</p> <p>Students must master: 1. The nature and specifics of mythological and folkloric culture 2. The nature and specifics of literature in the Antiquity 3. The nature and specifics of Medieval literature</p> <p>Students must master: 1. The transition from folklore to literatures in European literature 2. The evolution of Ancient Greek poetry 3. The evolution of drama in the Antiquity 4. The link between history and drama 5. The evolution of Christian literature 6. The development of literature in the Middle Ages</p>	<p>myth-based and folklore-based culture Antiquity Middle Ages</p> <p>literature of the Antiquity epopee, poetry of the Antiquity, drama of the Antiquity, medieval tales of chivalry</p>	<p>3. To comment on the influence of ancient forms of literature 4. To familiarize themselves with the different ways and contexts in which literature was disseminated in the Antiquity</p> <p>Students are given the opportunity: 1. To familiarize themselves with the key features of mythological and folkloric culture, the Antiquity, and the Middle Ages</p> <p>Students are given the opportunity: 1. To familiarize themselves with the key problems raised in ancient and Medieval literature and with the key works, included in the program.</p>	<p>The content in literature, complemented with the content in history and philosophy, gives students the opportunity to gain a comprehensive idea of the development of European civilization.</p> <p>The content in literature, complemented with the content in history and philosophy, gives students the opportunity to acquire a comprehensive knowledge of the history of ancient and Medieval culture.</p>
	<p>Standard 4: • The student is familiar with the development of Bulgarian Medieval literature as part of the European cultural process based on the works, included</p>	<p>Students must master: 1. The nature and specifics of Bulgarian Medieval literature 2. The tradition of Cyril and Methodius in the evolution of Bulgarian Medieval literature</p>	<p>Medieval literature, apocrypha, passional</p>	<p>Students are given the opportunity: 1. To analyze and interpret the specifics of Medieval literature</p>	<p>The content in literature, complemented with the content in history and philosophy, gives students the opportunity to acquire a comprehensive knowledge</p>

Annexes

1	2	3	4	5	6
	in the compulsory content: <i>five works of Bulgarian Medieval literature are listed as compulsory</i>	3. The culture of the so-called Golden Century in the history of Bulgarian nation and literature			of the history of Bulgarian Medieval culture.
Core 3: Socio-cultural and literary competencies: communicating with a literary work	Standard 1: • The student is able to place the literary work studied into the cultural environment in which it was created and to analyze it according to the specifics of this environment Standard 2: • The student is able to extract the message of a given literary work, having in mind its place in the writers' heritage, in the development of literature in the specific period, as well as in a more general perspective Standard 3: • The student is able to identify	Students must master: 1. The link between ancient culture and the problems that persisted in ancient societies 2. The main characteristics of literature in the Antiquity 3. The main problems of ancient societies 4. The characteristic structure of literary works from the Antiquity 5. The special impact which these works had and the way in which it was achieved 6. The main characteristics of Medieval literature and its social function and impact Students must master: 1. Literary analysis by commenting the structural and thematic characteristics of the literary work in view of the key humanitarian issues of the period Students must master: 1. The principles according to which readers identify themselves with the character in a literary work	social and cultural developments and their impact on literature social function of literature social and cultural developments and their impact on literature specifics of literary norms social function of a given literary work identification catharsis	Students are given the opportunity: 1. To identify the issues raised in the literary works studied and to compare them with the key humanitarian issues of the period 2. To analyze and comment on the link between the structure of a given literary work and its social function	The content in literature, complemented with the content in philosophy, gives students the opportunity to extend their knowledge on humanitarian values and problems.

Annexes

1	2	3	4	5	6
	<p>and comment on the link between the message of the literary work and the issues it addresses</p>	<p>2. The application of the catharsis principle in a modern cultural context</p>	<p>mass culture</p>	<p>Students are given the opportunity: 1. To identify modern issues in ancient and Medieval literary works and to compare them with similar issues in works of modern culture 2. To discuss humanitarian issues based on the principles identified in a given literary work</p>	
<p>Core 4: Socio-cultural and literary competencies: producing oral statements and written texts</p>	<p>Standard 1: • The student is able to identify the specifics of a communicative situation and structure his or her statement or written text accordingly</p> <p>Standard 2: • The student is able to produce a coherent statement or written text, using the right arguments and stylistic devices to exert maximum impact</p>	<p>Students must master: 1. The parameters of a communicative situation - participants - purpose - link between the topic and the potential impact on the listener or reader</p> <p>Students must master: 1. The strategy and technique for presenting arguments in a logical sequence 2. Different composition patterns 3. The principles in choosing stylistic devices</p>	<p>socio-cultural context functions of a text meaning and purpose of a text</p> <p>arguments</p> <p>logical sequence</p> <p>proof example composition stylistic devices</p>	<p>Students are given the opportunity: 1. To analyze statements and written texts in view of their communicative structure 2. To produce statements and written texts, having developed a communication strategy 3. To identify mistakes in statements and written texts produced by them or by others, and to comment on these mistakes</p> <p>Students are given the opportunity: 1. To analyze the logical sequence of arguments in a statement or written text and to develop their own sequence 2. To analyze different composition patterns 3. To analyze the choice of stylistic devices in a statement or written text</p> <p>Students are given the</p>	

Annexes

1	2	3	4	5	6
	<p>Standard 3:</p> <ul style="list-style-type: none"> • The student is able to collect information from different sources and organize it in view of the task ahead <p>Standard 5:</p> <ul style="list-style-type: none"> • The student is able to write a well-structured interpretative composition on a given literary work or an essay on a humanitarian problem 	<p>Students must master:</p> <ol style="list-style-type: none"> 1. The key sources of information on literary issues 2. The principles for organizing information <p>Students must master:</p> <ol style="list-style-type: none"> 1. The specifics of interpretative compositions and essays 	<p>information compendium monograph encyclopedia database</p> <p>quotation reference composition pattern analysis interpretation</p>	<p>opportunity:</p> <ol style="list-style-type: none"> 1. To find information on a given topic 2. To organize it based on a chosen classification principle <p>Students are given the opportunity to:</p> <ol style="list-style-type: none"> 1. Analyze interpretative compositions and essays written by other people and to write their own on a given topic 2. Analyze and interpret literary works included in the curriculum 3. Write interpretative compositions and essays on a given topic 4. Analyze mistakes. 	

Source: MES, 2003e. Official Document. Bulgaria

ANNEX 4. STUDY PROGRAM FOR GEOGRAPHY FOR 9TH GRADE (1998)**Main goal:**

To build upon already studied content by providing student with knowledge and skills on natural resources, political, social and economic organization of society, population and settlements, economy, main geographic regions of the world.

Main objectives:

- ⇒ To introduce a system of well structured scientific knowledge on the topics included in the study program
- ⇒ To provide students with the necessary knowledge and skills for independent study and in-depth analysis of modern processes and phenomena from the point of view of geography
- ⇒ To contribute to strengthening the students' cognitive capacity
- ⇒ To help students realize how important it is to live in peace, cooperate with other countries, be tolerant to other nations, and respect their culture and values
- ⇒ To build skills for working with geographic texts, using international and national framework documents, analyzing statistical information and maps, discussing issues related to geography.

Structure and content of the course

- ⇒ Introduction
- ⇒ Development and modern structure of the geographic science – 2 class hours
- ⇒ Natural resources of the world – 5 class hours
- ⇒ Political, social, and economic organization of society – 5 class hours
- ⇒ Demographics, population and settlements – 5 class hours
- ⇒ Geography of the global economy. Division of labor. Market versus centralized economy – 12 class hours
- ⇒ Geographic regions of the world – 16 class hours

Key requirements for selecting and structuring the content

- ⇒ the content must be structured and presented so as to build upon already acquired knowledge in previous classes
- ⇒ the content must be scientific, but accessible for the students
- ⇒ the content must reflect modern developments in the geographic science, as well as the fundamental principles of the International Charter for Geography Education
- ⇒ the content should ensure logical transition to the study program for tenth grade
- ⇒ interdisciplinary links should be established with the content in history, Bulgarian language, foreign languages, chemistry, biology, etc.

Class hour allocation

- | | |
|---|----------------|
| ⇒ for new content | 45 class hours |
| ⇒ for practical exercises and discussions | 11 class hours |
| ⇒ for revision and summary | 7 class hours |
| ⇒ for assessment and self-assessment | 6 class hours |
| ⇒ teacher's reserve | 3 class hours |

Exit level knowledge and skills

At the end of the school year students must

1. be familiar with:

- ⇒ the subject and structure of modern geographic science
- ⇒ the main natural resources and their territorial concentration
- ⇒ the political and economic systems in the world and the increasing role of international institutions

- ⇒ the main aspects of population mobility and structure, the ethnic and religious differences, and the types of settlements that exist in the world
- ⇒ the structure of global economy and the role of the international division of labor
- ⇒ the features, problems and development of the main geographic region of the world

2. be able to:

- ⇒ analyze geographic texts, documents, maps and statistical information
- ⇒ assess the availability of natural resources in a given region
- ⇒ draw schemes, diagrams, and other illustrative material
- ⇒ explain the main economic features of a region
- ⇒ compare natural resources, population specifics, territorial structure and economic characteristics of different regions
- ⇒ draw conclusions and make summaries
- ⇒ express a personal opinion based on the knowledge they have acquired, providing adequate arguments
- ⇒ independently seek and obtain information from other sources
- ⇒ prepare and make presentations on geographic objects and phenomena

Topics for compulsory elective classes

1. Current problems in the development of modern geography
– 2 class hours for lectures and 1 class hour for practical exercise
2. Global models for the development of the world after the end of the Cold War
– 2 + 1 class hours
3. Electoral geography (institutions, parties, elections)
– 2 + 1 class hours
4. Urbanization: consequences and problems
– 2 + 1 class hours
5. Global and regional challenges to sustainable development
– 2 + 0 class hours
6. European integration
– 3 + 2 class hours
7. Problems of the transition to market economy in Eastern Europe
– 3 + 2 class hours
8. Integration processes in North America
– 2 + 1 class hours
9. Natural, demographic, social and economic contrasts in Africa, Asia and Latin America
– 3 + 2 class hours
10. The challenges of the 21st century: geographic aspects
– 2 + 1 class hours

Main concepts

Follows a list of key concepts, which students would be introduced to throughout the course

Source: MES, 1998b. Official Document. Bulgaria.

Annexes

ANNEX 5. CURRICULUM FOR GEOGRAPHY FOR 9TH GRADE (2003)

1	2	3	4	5	6
Core content	Expected results in view of the overall curriculum	Expected results in each topic	New concepts introduced	Context and activities	Interdisciplinary links
Core 1: Structure and natural resources of the Earth		<u>Students must master:</u> <u>Topic 1:</u> Development and modern structure of the geographic science <i>Expected results are listed in detail after each topic</i>	<i>New concepts, which students are expected to learn are listed for each topic</i>	<u>Students are given the opportunity:</u> 1. To discuss the modern structure of geography in view of its overall development 2. To observe natural phenomena, typical for some geographic regions 3. To watch documentaries on nature 4. To work in a team 5. To work with statistical information 6. To work with documents and identify trends 7. To work with geographic and thematic maps	<i>The content is linked to the content in physics, biology, chemistry, history, literature, philosophy, mathematics</i>
	<u>Standard 1:</u> - The student is able to identify and describe geographic regions and phenomena <i>Expected results in view of the overall curriculum are listed after each standard</i>	<u>Topic 2:</u> Geospheric structure of the Earth			
	<u>Standard 2</u> - The student is able to identify typical natural resource distribution patterns and the link between them	<u>Topic 3:</u> Natural components and complexes on Earth <u>Topic 4:</u> Impact of human economic activity on nature			
	<u>Standard 3</u> - The student is able to compare different geographic regions and assess their natural resources	<u>Topic 5:</u> Natural zones on Earth <u>Topic 6:</u> Natural resources on Earth			
	<u>Standard 4</u> - The student is able to explain global problems related to ecology and effective use of natural resources, and is familiar with the concept of sustainable development	<u>Topic 7:</u> Global problems: energy, ecology			
	<u>Standard 5</u> - The student is able to identify the reasons for different natural calamities (earthquakes, floods, landslides, etc.) and their consequences	<u>Topic 8:</u> Natural calamities and risks			
Core 2: Population and settlements	<u>Standard 1</u> - The student is able to explain the demographic characteristics of the world population	<u>Topic 1:</u> World population			
	<u>Standard 2</u> - The student is able to discuss demographic problems and suggest possible solutions	<u>Topic 2:</u> Demographic problems and policies			
	<u>Standard 3</u> - The student is able to compare the demographic situation in different parts of the world	<u>Topic 3:</u> Demographic differences in the world			

Annexes

1	2	3	4	5	6
	<u>Standard 4</u> - The student is able to trace the formation and development of settlements and discuss changes in the function of towns	<u>Topic 4:</u> Geography of settlements			
	<u>Standard 5</u> - The student is able to discuss the characteristics of urbanization and the problems that it breeds	<u>Topic 5:</u> Urbanization			
<u>Core 3:</u> Political and economic organization of society Geography of the world economy	<u>Standard 1</u> - The student is able to comment global political processes, regional conflicts and the reasons for them	<u>Topic 1:</u> Political systems			
	<u>Standard 2</u> - The student understands main market economy mechanisms and prioritize the factors, which affect world economy development	<u>Topic 2:</u> Geography of the world economy			
	<u>Standard 3</u> - The student is able to group economic branches into sectors and describe their territorial structure	<u>Topic 3:</u> Geography of the world economy: sectors and branches of economy. Primary sector <u>Topic 4:</u> Secondary sector <u>Topic 5:</u> Tertiary sector <u>Topic 6:</u> Poles of the world economy			
	<u>Standard 4</u> - The student is able to discuss the main economic problems of modern times and identify possible solutions	<u>Topic 7:</u> Global problems of modernity			
	<u>Standard 5</u> - The student is able to explain the principles of international cooperation and the activity of some international organizations	<u>Topic 8:</u> Global, regional and international organizations			
<u>Core 4:</u> Geographic regions and countries of the world	<u>Standard 1</u> - The student is able to explain the role of historical and geographic factors for the development of the different regions	<u>Topic 1:</u> Regional geography			
	<u>Standard 2</u> - The student is able to identify the characteristic features of different regions in the world and draw conclusions about their peculiarities	<u>Topic 2:</u> Geographic regions in Europe, Asia, and America			

Annexes

1	2	3	4	5	6
	<u>Standard 3</u> - The student is able to identify characteristic features of the economy in different regions of the world	<u>Topic 3:</u> Economic development of regions and countries in the world			
	<u>Standard 4</u> - The student is able to describe the situation in selected countries within each region	<u>Topic 4:</u> Countries constituting a typical example for the region they belong to			
	<u>Standard 5</u> - The student is able to identify regional problems and discuss possible solutions based on the concept for sustainable development	<u>Topic 5:</u> Global problems of modernity and their impact on individual regions			
Core 5: Geographic and economic information	<u>Standard 1</u> - The student is familiar with the main approaches and methods used in modern geographic and economic research	<u>Topic 1:</u> Approaches and methods in modern geographic and economic research <u>Topic 2:</u> Cartography and geographic knowledge			
	<u>Standard 2</u> - The student is familiar with the opportunities, which geographic information systems provide, and with their practical application	<u>Topic 3:</u> Geographic information systems – nature and applications			
	<u>Standard 3</u> - The student is able to compare maps with different thematic focus				
	<u>Standard 4</u> - The student is able to analyze statistical tables and graphs with geographic and economic information, and to draw conclusions	<u>Topic 4:</u> Work with texts and illustrative material, providing geographic and economic information			
	<u>Standard 5</u> - The student is able to study and analyze different types of documents and extract useful information; write reports and essays on geographic issues				

MES, 2003f. Official Document. Bulgaria

ANNEX 6. STUDY PLAN FOR FRENCH LANGUAGE FOR 9TH GRADE (1998)

Goals:

Reading:

Students are expected to read and understand in some detail authentic texts which they have not studied before. Texts may contain some unfamiliar words or phrases, the meaning of which could be grasped based on the context or the analogy with “international” words, as well as based on a root or a word-forming pattern that is familiar to the students.

Objectives:

1. Students are able to understand instructions and announcements in public transportation vehicles, commercial centers and tourist sites (instructions, signs, notices, posters, announcements, timetables and schedules)
2. Students are able to extract useful information from reference books and publicity publications, newspaper articles and correspondences (leaflets, catalogues, menus, guidebooks, radio and TV guides, advertisements, weather forecasts, news briefs, articles, personal and official letters, application forms)
3. Students are able to understand the general meaning and some important details of:
 - literary texts (excerpts from short stories, novels, plays, biographies, poems, ballads)
 - popular science articles (excerpts)
 - personal correspondence
 - official letters to and from various institutions
4. Students are able to identify the genre, purpose and function of a text, as well as to point out some stylistic features.
5. Students are able to use compensatory strategies to extract as much information as possible from a text (text structure, link between title and content, illustrative material and content, keywords, phrases, sentences)
6. Students are able to use reference materials independently (bilingual and monolingual dictionaries, thesauruses, school grammars).
7. When reading, students are able to implement the following strategies:
 - understand the general meaning
 - understand some important details
 - understand based on the context

Listening:

Students are expected to understand the general meaning and some important details of spoken statements when communicating with French language speakers, talking on the phone, listening to the radio, watching TV or listening tapes.

Objectives:

1. Students are able to understand instructions and announcements in public transportation vehicles and in public places (railway stations, airports, commercial centers, etc.), as well as communication on the phone, on radio and TV.
2. Students are able to understand short or extended conversations with two or more participants.
3. Students are able to extract key information and some useful details, even when they are not explicitly formulated, when listening to announcements, advertisements, news bulletins, weather forecasts, reports, discussions, interviews, songs.
4. Students are able to use compensatory strategies to extract as much information as possible from a spoken communication (identify the specifics, function and purpose of the oral statement, identify some characteristic features of the speakers)
5. When listening, students are able to implement the following strategies:
 - understand the general meaning
 - understand some important details
 - understand based on the context

Speaking:

Students are expected to make their own oral statements independently, as well as to carry on a conversation when communicating with French language speakers or talking on the phone.

Objectives:

1. Students are able to carry on a conversation on everyday issues with one or more collocutors.
2. Students are able to carry on conversations on an unfamiliar topic with unknown collocutors.
3. Students are able to carry on an extended conversation, expressing their opinion, sharing feelings, and presenting facts and events.
4. Students are able to present a coherent oral account of actual or imaginative events before one or more listeners.
5. Students are able to talk on the phone, seeking or providing information, expressing opinions, sharing feelings, and presenting facts and events.
6. Students are able to use appropriate language, intonation, and attitude when talking to different collocutors or in a different context.

Writing:

Students are expected to produce written text on everyday issues, presenting facts and events and using the appropriate style for the chosen communicative situation.

Objectives:

1. Students are able to fill in application and other forms.
2. Students are able to write a short CV.
3. Students are able to write personal letters in which they present facts and events and express personal experiences.
4. Students are able to structure and answer to greetings and congratulatory messages.
5. Students are able to write invitations for personal visits or participation in different events, as well as to respond to such invitations.
6. Students are able to write official letters and orders for goods and services.
7. Students are able to summarize in writing oral statements, delivered by other people.

Contents

Topics

1. Moving to a new house or neighborhood, making new friends and acquaintances
2. Traditions, folklore, rites, rituals, festivities, fairytales, legends, myths
3. Monuments of culture
4. Music
6. Eating out: restaurant, coffee shop, pastry shop, national cuisines

Texts

1. For reading comprehension
 - short stories, excerpts from novels, plays, biographies, poems, ballads
 - comic books and cartoons
 - instructions, signs, notices, posters, announcements, timetables and schedules
 - catalogues, leaflets, instructions, recipes, menus
 - autobiographies, application forms, questionnaires
 - telegrams, postcards, personal and official letters
2. For listening comprehension
 - news bulletins, reports, interviews, discussions
 - advertisements
 - radio and TV programs
 - songs
 - conversations with two or more participants
 - phone conversations
 - announcements (at railway stations, airports, etc.)
3. For speaking
 - conversations with one or more collocutors, including extended oral statements
 - phone conversations

4. For writing

- telegrams, postcards, personal and official letters
- CVs
- application and other forms
- notes

Spheres, roles and places of communication

1. Spheres

Students communicate in the following spheres:

- free time
- services
- mass media

2. Roles

Students perform different roles depending on the communicative situation:

- customer – seller
- customer – service provider
- private citizen – public official (in an institution)
- patient – medical service provider
- traveler – traveler
- traveler – transportation service staff
- neighbor – neighbor
- guest – host
- participant in a discussion
- viewer, listener, reader

3. Places of communication

- at home
- at school
- on the street
- at public places
- in public transportation vehicles
- in the countryside

MES, 1998c. Official Document. Bulgaria

Annexes

ANNEX 7. CURRICULUM FOR FRENCH LANGUAGE AS A FIRST FOREIGN LANGUAGE FOR 9TH GRADE (2003)

1	2	3	4	5	6
Core content	Expected results in view of the overall curriculum	Expected results in each topic	New concepts introduced	Context and activities	Interdisciplinary links
LISTENING	<p>1. Students are able to grasp the general meaning of newspaper articles and excerpts of literary works when read to them with a normal speed and a standard pronunciation</p> <p>2. Students are able to understand in some detail conversations and oral statements</p> <p>3. Students are able to extract specific information from news reports, interviews and discussions</p>	<p>Students must be able:</p> <ul style="list-style-type: none"> - to understand news reports, interviews, discussions, songs, legends, myths; personal and phone conversations; announcements at railway stations, airports, etc. - to participate as listeners in conversations on issues related to free time, education and services - to identify the logical links in a conversation - to understand thematic texts on traditions, folklore, rituals, and festivities; on scientific and geographic discoveries; on cultural events - to understand and use properly the grammatical structures they have studied. 	<p>temporal links</p> <p>chronological structure</p> <p>conventionality</p> <p>sequence of tenses</p> <p>narrative text</p>	<p>Students are given the opportunity to:</p> <ul style="list-style-type: none"> - listen to texts spoken by native speakers - work with different sources of information (radio, TV, video, Internet, Vifax) - work individually, in small groups, or in a larger group - participate in projects - apply different listening strategies 	<p>The content in French language is linked to the content in the following subjects:</p> <ul style="list-style-type: none"> - Bulgarian language and literature - second foreign language - history - geography - psychology and logic - natural sciences and ecology - mathematics and ICT - music - arts
READING	<p>1. Students are able to grasp the general meaning of newspaper articles, excerpts of literary works and popular science texts</p> <p>2. Students are able to understand in some detail personal and official letters, written instructions, and short articles on familiar topics</p> <p>3. Students are able to extract useful information from leaflets, catalogues, and reference books.</p>	<p>Students must be able:</p> <ul style="list-style-type: none"> - to understand short literary works or excerpts, myths, legends, comic books, signs, written notices, instructions, recipes, menus, postcards, letters, CVs. - to read texts on issues related to mass media, free time, and education - to identify the logical links in a text - to understand thematic texts on traditions, folklore, rituals, and festivities; on scientific and geographic discoveries; on cultural events - to understand and use properly the grammatical structures they have studied. 	<p>temporal links</p> <p>chronological structure</p> <p>conventionality</p> <p>sequence of tenses</p> <p>narrative text</p>	<p>Students are given the opportunity to:</p> <ul style="list-style-type: none"> - read to original French texts - work with different sources of information (books, newspapers, authentic documents, Internet) - use reference materials (dictionaries, thesauruses, school grammars) - apply different reading strategies - participate in projects - work individually, in small groups, or in a larger group 	<p>The content in French language is linked to the content in the following subjects:</p> <ul style="list-style-type: none"> - Bulgarian language and literature - second foreign language - history - geography - psychology and logic - natural sciences and ecology - mathematics and ICT - music - arts

Annexes

1	2	3	4	5	6
SPEAKING	<p>1. Students are able to talk on a topic that is familiar to them</p> <p>2. Students are able to seek information, ask for different items, request services, expressing their preferences</p> <p>3. Students are able to talk on the phone and leave messages to answering machines</p> <p>4. Students are able to choose style, language and linguistic devices appropriate to the communicative situation</p>	<p>Students must be able:</p> <ul style="list-style-type: none"> - to seek and give information, express attitudes and feelings, explain actions - to talk about traditions, folklore, rituals, festivities, scientific and geographic discoveries, cultural events - participate in discussions with one or more participants, making extended statements on familiar topics - to talk on issues related to mass media, free time, and education - to establish logical links in a statement - to use properly the grammatical structures they have studied. 	<p>temporal links</p> <p>chronological structure</p> <p>conventionality</p> <p>sequence of tenses</p> <p>narrative text</p>	<p>Students are given the opportunity to:</p> <ul style="list-style-type: none"> - communicate in different contexts - talk and express their opinion in class - communicate in a favoring environment - participate in projects - work individually, in small groups, or in a larger group 	<p>The content in French language is linked to the content in the following subjects:</p> <ul style="list-style-type: none"> - Bulgarian language and literature - second foreign language - history - geography - psychology and logic - natural sciences and ecology - mathematics and ICT - music - arts
WRITING	<p>1. Students are able to produce a summary of the basic content of a text they have read</p> <p>2. Students are able to write a personal or an official letter</p> <p>3. Students are able to choose appropriate style, language and linguistic devices</p>	<p>Students must be able to:</p> <ul style="list-style-type: none"> - seek and give written information, express attitudes and feelings in writing, explain actions - write about traditions, folklore, rituals, festivities, national cuisine, unknown places, cultural events - write personal letters, postcards and official letters to institutions, to fill in forms and take notes - write on issues related to mass media, free time, and education - establish logical links in a written text - use properly the grammatical structures they have studied. 	<p>temporal links</p> <p>chronological structure</p> <p>conventionality</p> <p>sequence of tenses</p> <p>narrative text</p>	<p>Students are given the opportunity to:</p> <ul style="list-style-type: none"> - keep correspondence in French by regular mail or by e-mail - work individually, in small groups, or in a larger group - participate in projects - work with reference materials (dictionaries, thesauruses, school grammars) 	<p>The content in French language as a first foreign language is linked to the content in the following subjects:</p> <ul style="list-style-type: none"> - Bulgarian language and literature - second foreign language - history - geography - psychology and logic - natural sciences and ecology - mathematics and ICT - music - arts

MES, 2003c. Official Document. Bulgaria

Annexes

ANNEX 8. STUDY PLAN GENERAL EDUCATION, 1997-1998 (BEFORE REFORM)

N	SUBJECTS	EDUCATION LEVELS												
		primary school				secondary school				upper secondary school				
		G R A D E S												
		I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	XIII
NUMBER OF SCHOOL WEEKS														
		31	32	32	32	34	34	34	34	36	36	31/36	31/36	31
A	COMPULSORY CLASSES													
1	Bulgarian language and literature	8	8	8	8	5	5	5	5	3	3	3	2	2
2	Foreign languages	-	-	-	-	4	4	4	4	4	4	4	4	4
3	Mathematics	4	4	4	4	5	4	4	4	4	3	3	2	2
4	Computer technologies	-	-	-	-	-	-	-	-	-	-	2	2	-
5	Introduction to geography and history of Bulgaria	1/2	2	2	2	-	-	-	-	-	-	-	-	-
6	History	-	-	-	-	2	2	2	2	2	2	3	-	-
7	Philosophy	-	-	-	-	-	-	-	-	2	2	2	2	-
8	Introduction to natural sciences	-	-	1/2	2	2	2	-	-	-	-	-	-	-
9	Physics and astronomy	-	-	-	-	-	-	2	2	2	2	1	-	-
10	Chemistry	-	-	-	-	-	-	2	2	2	2	-	-	-
11	Biology	-	-	-	-	-	2	2	2	2	2	-	-	-
12	Geography	-	-	-	-	-	2	2	2	2	2	-	-	-
13	Visual arts	2	2	2	2	2	2	2	2	1	-	-	-	-
14	Music	2	2	2	2	2	2	2	2	1	-	-	-	-
15	Labor skills	1	1	2	2	-	-	-	-	-	-	-	-	-
16	Labor skills and mechanics	-	-	-	-	2	2	1	1	-	-	-	-	-
17	Technologies	-	-	-	-	-	-	-	-	2	2	-	-	-
18	Physical education (sports)	4/3	3	3	3	3	3	2	2	2	2	3	3	3
	TOTAL A	22	22	24/25	25	27	30	30	30	29	26	21	15	11
B	COMPULSORY ELECTIVE SUBJECTS (PROFILE-ORIENTED STUDIES)	-	-	-	-	-	-	-	-	2	5	11	17	21
	TOTAL A + B	22	22	24/25	25	27	30	30	30	31	31	32	32	32
C	NON-COMPULSORY ELECTIVES	3	4	4	4	4	4	4	4	4	4	4	4	4
	TOTAL A+B+C	25	26	28/29	29	31	34	34	34	35	35	36	36	36

MES, 1998a. Official Document. Bulgaria.

Annexes

ANNEX 9. STUDY PLAN GENERAL EDUCATION, 1999-2000 (AFTER REFORM)

N:	EDUCATION AREAS	EDUCATION LEVELS																
		BASIC EDUCATION								SECONDARY EDUCATION								
		Primary school				TOTAL I-IV	Pre-high school				TOTAL V-VIII	TOTAL I-VIII	High school				TOTAL IX-XII	TOTAL I-XII grade
	SUBJECTS	CLASSES					CLASSES						CLASSES					
		I	II	II	IV	V	VI	VII	VIII	IX	X	XI	XII					
	(School weeks)	31	32	32	32	34	34	34	34	36	36	36	31					
A	COMPULSORY CLASSES (CCs)																	
1.	BULG. LANGUAGE AND LITERATURE					889					680	1569					386	1955
	Bulgarian language and literature	217	224	224	224	889	170	170	170	170	680	1569	108	108	108	62	386	1955
2.	FOREIGN LANGUAGES					254					544	798					288	1086
	First foreign language	62	64	64	64	254	68	68	68	68	272	526	72	72			144	670
	Second foreign language						68	68	68	68	272	272	72	72			144	416
3.	MATHS, INFORMATICS AND INFORMATION TECHNOLOGIES					413					544	957					360	1317
	Mathematics	93	96	112	112	413	136	136	136	136	544	957	72	72	72		216	1173
	Informatics												72				72	72
	Information technologies												36	36			72	72
4.	PUBLIC SCIENCES AND CIVIC EDUCATION					127					408	535					530	1065
	Introduction to geography and history of Bulgaria	31				31						31						31
	Man and society			48	48	96						96						96
	History and civilization						51	51	51	51	204	204	72	72	72		216	420
	Geography and economics						51	51	51	51	204	204	54	54			108	312
	Psychology and logic												54				54	54
	Ethics and law													54			54	54
	Philosophy														36		36	36
	World and personality															62	62	62
5.	NATURAL SCIENCES AND ECOLOGY					128					510	638					324	962

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N:	EDUCATION AREAS	EDUCATION LEVELS																
		BASIC EDUCATION									SECONDARY EDUCATION							
		Primary school					Pre-high school				TOTAL I-VIII	High school				TOTAL IX-XII	TOTAL I-XII grade	
SUBJECTS		CLASSES				TOTAL I-IV	CLASSES					TOTAL IX-XII	CLASSES					
	(School weeks)	I	II	II	IV		V	VI	VII	VIII			IX	X	XI			XII
		31	32	32	32	34	34	34	34	36	36	36	31					
	Introduction to natural sciences		32			32					32						32	
	Man and nature			48	48	96	85	85			170	266					266	
	Biology and health education								68	68	136	136	72	36			108	244
	Physics and astronomy								51	51	102	102	72	36			108	210
	Chemistry and ecology								51	51	102	102	72	36			108	210
6.	ARTS					476					476	952					72	1024
	Music	62	64	48	64	238	68	68	51	51	238	476	36				36	512
	Visual arts	62	64	48	64	238	68	68	51	51	238	476	36				36	512
7.	LIFE AND TECHNOLOGIES					127					170	297						297
	Household skills	31	32	32	32	127						127						127
	Household economy						51	51			102	102						102
	Technologies								34	34	68	68						68
8.	PHYSICAL EDUCATION AND SPORTS					286					306	592					278	870
	Physical education and sports	62	64	80	80	286	85	85	68	68	306	592	72	72	72	62	278	870
	TOTAL CCs	620	640	720	720	2700	901	901	918	918	3638	6338	972	720	360	186	2238	8576
B.	COMPULSORY ELECTIVE CLASSES (CECs)																	
		62	68	80	80	286	119	119	102	102	442	728	180	432	792	806	2210	2938
	TOTAL CCs+CECs	682	704	800	800	2986	1020	1020	1020	1020	4080	7066	1152	1152	1152	992	4448	11514
C.	NON-COMPULSORY ELECTIVES (NCEs)																	
		124	128	128	128	508	136	136	136	136	544	1052	144	144	144	124	556	1608
	TOTAL CCs+CECs+NCEs	806	832	928	928	3494	1156	1156	1156	1156	4624	8118	1296	1296	1296	1116	5004	13122

MES, 1999e. Official Document. Bulgaria

Annexes

ANNEX 10. SCHOOL-BASED STUDY PLAN GENERAL EDUCATION, 1999-2000 (AFTER REFORM)

Applicable to profile-oriented schools and schools with intensive language teaching after grade 7

N:	EDUCATION AREAS	EDUCATION LEVELS					
		SECONDARY EDUCATION					
SUBJECTS		High school					
<i>CLASSES →</i>		VIII	IX	X	XI	XII	TOTAL VIII-XII
<i>(School weeks) →</i>		34	36	36	36	31	
A	COMPULSORY CLASSES (CCs)						
1.	BULG. LANGUAGE AND LITERATURE						
	Bulgarian language and literature	170	108	108	108	62	556
2.	FOREIGN LANGUAGES						
	First foreign language	646	144	144	144	124	1202
	Second foreign language		72	72	72	62	278
3.	MATHS, INFORMATICS AND INFORMATION TECHNOLOGIES						
	Mathematics	136	72	72	72		352
	Informatics		36	36			72
	Information technologies		36	36			72
4.	PUBLIC SCIENCES AND CIVIC EDUCATION						
	History and civilization		72	72	72	62	278
	Geography and economics		54	54	54		162
	Psychology and logic		54				54
	Ethics and law			54			54
	Philosophy				36		36
	World and personality					62	62
5.	NATURAL SCIENCES AND ECOLOGY						
	Biology and health education		72	72	36		180
	Physics and astronomy		54	36	72		162
	Chemistry and ecology		54	36	72		162
6.	ARTS						
	Music	34	36				70
	Visual arts	34	36				70
7.	LIFE AND TECHNOLOGIES						
	Technologies	34					
8.	PHYSICAL EDUCATION AND SPORTS						
	Physical education and sports	68	72	72	72	62	346
	TOTAL CCs	1222	972	864	810	434	4202

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N:	EDUCATION AREAS	EDUCATION LEVELS					
		SECONDARY EDUCATION					
	SUBJECTS	High school					
	<i>CLASSES →</i> (School weeks) →	VIII	IX	X	XI	XII	TOTAL VIII-XII
		34	36	36	36	31	
B.	COMPULSORY ELECTIVE CLASSES (CECs)	0	180 (5 hrs/week)	288 (8 hrs/week)	342 (9.5 h/week)	558 (18 h/week)	1368
	TOTAL CCs+CECs	1122	1152	1152	1152	992	5570
C.	NON-COMPULSORY ELECTIVES (NCEs)	34	144	144	144	124	590
	<i>TOTAL CCs+CECs+NCEs</i>	1156	1296	1296	1296	1116	6160

MES, 1999d. Official Document. Bulgaria.

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ANNEX 11. STUDY PLAN GENERAL EDUCATION, 2001 (AFTER REVISION)

N:	EDUCATION AREAS	EDUCATION LEVELS																	
		BASIC EDUCATION										SECONDARY EDUCATION							
		Primary school					Pre-high school					High school							TOTAL I-XII grade
SUBJECTS		CLASSES				TOTAL I-IV	CLASSES				TOTAL V-VIII	TOTAL I-VIII	CLASSES				TOTAL IX-XII		
		I	II	II	IV		V	VI	VII	VIII			IX	X	XI	XII			
(School weeks) →		31	32	32	32	34	34	34	34	36	36	36	31						
A	COMPULSORY CLASSES (CCs)																		
1.	BULG. LANGUAGE AND LITERATURE					889					680	1569					386	1955	
	Bulgarian language and literature	217	224	224	224	889	170	170	170	170	680	1569	108	108	108	62	386	1955	
	Hours per week	7	7	7	7		5	5	5	5			3	3	3	2			
2.	FOREIGN LANGUAGES					256					578	834					288	1122	
	First foreign language		64	96	96	256	85	85	68	68	306	562	72	72			144	706	
	Hours per week		2	3	3		2.5	2.5	2	2			2	2					
	Second foreign language						68	68	68	68	272	272	72	72			144	416	
	Hours per week						2	2	2	2			2	2					
3.	MATHS, INFORMATICS AND INFORMATION TECHNOLOGIES					476					544	1020					360	1380	
	Mathematics	124	112	112	128	476	136	136	136	136	544	1020	72	72	72		216	1173	
	Hours per week	4	3.5	3.5	4		4	4	4	4			2	2	2				
	Informatics												72				72	72	
	Hours per week												2						
	Information technologies												36	36			72	72	
	Hours per week												1	1					
4.	PUBLIC SCIENCES AND CIVIC EDUCATION					127					408	535					530	1065	
	Introduction to geography and history of Bulgaria	31				31						31						31	
	Hours per week	1																	
	PUBLIC SCIENCES AND CIVIC EDUCATION (Cont.)																		
	Man and society			48	32	80						80						80	

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N:	EDUCATION AREAS	EDUCATION LEVELS																
		BASIC EDUCATION									SECONDARY EDUCATION							
		Primary school				Pre-high school					High school							
	SUBJECTS	CLASSES				TOTAL I-IV	CLASSES				TOTAL V-VIII	TOTAL I-VIII	CLASSES				TOTAL IX-XII	TOTAL I-XII grade
	(School weeks) →	I	II	III	IV		V	VI	VII	VIII			IX	X	XI	XII		
		31	32	32	32	34	34	34	34	36	36	36	31					
	Hours per week			1.5	1													
	History and civilization					51	51	51	51	204	204	72	72	72		216	420	
	Hours per week					1.5	1.5	1.5	1.5			2	2	2				
	Geography and economics					51	51	51	51	204	204	54	54			108	312	
	Hours per week					1.5	1.5	1.5	1.5			1.5	1.5					
	Psychology and logic											54				54	54	
	Hours per week											1.5						
	Ethics and law												54			54	54	
	Hours per week												1.5					
	Philosophy													36		36	36	
	Hours per week													1				
	World and personality														62	62	62	
	Hours per week														2			
5.	NATURAL SCIENCES AND ECOLOGY					128				510	638					324	962	
	Introduction to natural sciences		32			32					32						32	
	Hours per week		1															
	Man and nature			32	48	80	85	85		170	250						250	
	Hours per week			1	1.5		2.5	2.5										
	Biology and health education							68	68	136	136	72	36			108	244	
	Hours per week							2	2			2	1					
	Physics and astronomy							51	51	102	102	72	36			108	210	
	Hours per week							1.5	1.5			2	1					
	Chemistry and ecology							51	51	102	102	72	36			108	210	
	Hours per week							1.5	1.5			2	1					
6.	ARTS					444				476	920					72	992	
	Music	62	64	48	48	222	68	68	51	51	238	460	36			36	496	
	Hours per week	2	2	1.5	1.5		2	2	1.5	1.5			1					

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N:	EDUCATION AREAS	EDUCATION LEVELS																	
		BASIC EDUCATION										SECONDARY EDUCATION							
		Primary school					Pre-high school					High school							TOTAL I-XII grade
	SUBJECTS	CLASSES				TOTAL I-IV	CLASSES				TOTAL V-VIII	TOTAL I-VIII	CLASSES				TOTAL IX-XII		
	(School weeks) →	I	II	III	IV		V	VI	VII	VIII			IX	X	XI	XII			
		31	32	32	32	34	34	34	34	36	36	36	31						
	Visual arts	62	64	48	48	222	68	68	51	51	238	460	36				36	496	
	Hours per week	2	2	1.5	1.5		2	2	1.5	1.5			1						
7.	<i>LIFE AND TECHNOLOGIES</i>					127					170	297						297	
	Household skills	31	32	32	32	127						127						127	
	Hours per week	1	1	1	1														
	Household economy						51	51			102	102						102	
	Hours per week						1.5	1.5											
	Technologies								34	34	68	68						68	
	Hours per week								1	1									
8.	PHYSICAL EDUCATION AND SPORTS					286					306	592					278	870	
	Physical education and sports	62	64	80	80	286	85	85	68	68	306	592	72	72	72	62	278	870	
	Hours per week	2	2	2.5	2.5		2.5	2.5	2	2			2	2	2	2			
	TOTAL CCs	589	640	736	736	2701	918	918	918	918	3672	6373	972	720	360	186	2238	8611	
	Hours per week	19	20	23	23		27	27	27	27			27	20	10	6			
B.	<i>COMPULSORY ELECTIVE CLASSES (CECs)</i>	93	64	64	64	285	102	102	102	102	408	693	180	432	792	806	2210	2903	
	Hours per week	3	2	2	2		3	3	3	3			5	12	22	26			
	TOTAL CCs+CECs	682	704	800	800	2986	1020	1020	1020	1020	4080	7066	1152	1152	1152	992	4448	11514	
	Hours per week	22	22	25	25		30	30	30	30			32	32	32	32			
C.	NON-COMPULSORY ELECTIVES (NCEs)	124	128	128	128	508	136	136	136	136	544	1052	144	144	144	124	556	1608	
	Hours per week	4	4	4	4		4	4	4	4			4	4	4	4			
	TOTAL CCs+CECs+NCEs	806	832	928	928	3494	1156	1156	1156	1156	4624	8118	1296	1296	1296	1116	5004	13122	

MES, 2001d. Official Document. Bulgaria.

ANNEX 12. SCHOOL-BASED STUDY PLAN GENERAL EDUCATION, 2001 (AFTER REVISION)

Applicable to profile-oriented schools and schools with intensive language teaching after grade 7

N:	EDUCATION AREAS	EDUCATION LEVELS					
		SECONDARY EDUCATION					
SUBJECTS		High school					
<i>CLASSES →</i> (School weeks) →		VIII	IX	X	XI	XII	TOTAL VIII-XII
		34	36	36	36	31	
A	COMPULSORY CLASSES (CCs)						
1.	BULG. LANGUAGE AND LITERATURE						561
	Bulgarian language and literature	144	108	108	108	93	561
	Hours per week	4	3	3	3	3	
2.	FOREIGN LANGUAGES						1482
	First foreign language	648	144	144	144	124	1204
	Hours per week	18	4	4	4	4	
	Second foreign language		72	72	72	62	278
	Hours per week		2	2	2	2	
3.	MATHS, INFORMATICS AND INFORMATION TECHNOLOGIES						602
	Mathematics	108	108	108	72	62	458
	Hours per week	3	3	3	2	2	
	Informatics		36	36			72
	Hours per week		1	1			
	Information technologies		36	36			72
	Hours per week		1	1			
4.	PUBLIC SCIENCES AND CIVIC EDUCATION						677
	History and civilization		54	72	72	62	260
	Hours per week		1.5	2	2	2	
	Geography and economics		54	54	54	31	193
	Hours per week		1.5	1.5	1.5	1	
	Psychology and logic		54				54
	Hours per week		1.5				
	Ethics and law			54			54
	Hours per week			1.5			
	Philosophy				54		36
	Hours per week				1.5		
	World and personality					62	62
	Hours per week					2	

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N:	EDUCATION AREAS	EDUCATION LEVELS					
		SECONDARY EDUCATION					
SUBJECTS	CLASSES → (School weeks) →	High school					TOTAL VIII-XII
		VIII 34	IX 36	X 36	XI 36	XII 31	
5.	NATURAL SCIENCES AND ECOLOGY						643
	Biology and health education		72	72	72		216
	Hours per week		2	2	2		
	Physics and astronomy		54	72	72	31	229
	Hours per week		1.5	2	2	1	
	Chemistry and ecology		54	72	72		198
	Hours per week		1.5	2	2		
6.	ARTS						144
	Music	36	36				72
	Hours per week	1	1				
	Visual arts	34	36				72
	Hours per week	1	1				
7.	LIFE AND TECHNOLOGIES						36
	Technologies	36					
	Hours per week	1					
8.	PHYSICAL EDUCATION AND SPORTS						350
	Physical education and sports	72	72	72	72	62	350
	Hours per week	2	2	2	2	2	
	TOTAL CCs	1080	990	972	864	589	4495
	Hours per week	30	27.5	27	24	19	
B.	COMPULSORY ELECTIVE CLASSES (CECs)	0	162	180	288	403	1033
	Hours per week		4.5	5	8	13	
	TOTAL CCs+CECs	1080	1152	1152	1152	992	5528
C.	NON-COMPULSORY ELECTIVES (NCEs)	144	144	144	144	124	700
	TOTAL CCs+CECs+NCEs	1224	1296	1296	1296	1116	6228

MES, 2001e. Official Document. Bulgaria.

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ANNEX 13. EXAMPLE OF SCHOOL-BASED STUDY PLAN (2003-2004)

Grade		VIII				IX				X				XI				XII				TOTAL NUMBER OF CLASS HOURS
Class weeks		36				36				36				36				31				
Subjects		CCs+profile		CECs non- profile	Hours per year	CCs+profile		CECs non- profile	Hours per year	CCs+profile		CECs non- profile	Hours per year	CCs+profile		CECs non- profile	Hours per year	CCs+profile		CECs non- profile	Hours per year	
		CCs	CECs			CCs	CECs			CCs	CECs			CCs	CECs			CCs	CECs			CCs
1	Bulg. language and literature	4			144	3			108	3			108	3			108	3	1		124	592
2	1 st foreign lang.	18			648	4	2.5		234	4	1		180	4	2		216	4	2		186	1464
3	2 nd foreign lang.				0	2	2		144	2	1		108	2	1		108	2	2		124	484
4	Mathematics	3			108	3			108	3			108	2			72	2			62	458
5	Informatics				0	1			36	1			36				0				0	72
6	IT				0	1			36	1			36				0				0	72
7	History				0	1.5			54	2			72	2			72	2			62	260
8	Geography				0	1.5			54	1.5			54	1.5			54	1			31	193
9	Psychology/logic				0	1.5			54				0				0				0	54
10	Ethics and law				0				0	1.5			54				0				0	54
11	Philosophy				0				0				0	1.5			54				0	54
12	World and personality				0				0				0				0	2			62	62
13	Biology				0	2			72	2			72	2			72				0	216
14	Physics and astronomy				0	1.5			54	2			72	2			72	1			31	229
15	Chemistry				0	1.5			54	2			72	2			72				0	198
16	Music	1			36	1			36				0	2			0				0	72
17	Visual arts	1			36	1			36				0				0				0	72
18	Technologies	1			36				0				0				0				0	36
19	Physical educ.	2			72	2			72	2			72	2			72	2			62	350
20	3 rd foreign lang.				0				0		3		108		3		108		4		124	340
CCs		30				27.5				27				24				19				
CEC	Total					4.5				5				8				13				
	Taken					4.5				5				6				9				
	Free					0				0				2				4				
CCs + CECs		30				32				32				32				32				

Source: Frederick Joliot Curie Schools with intensive language teaching after grade 7, Sofia, 2003-2004.

Note: CCs = Compulsory classes; CECs = Compulsory elective classes

ANNEX 14. ALLOCATION OF CLASS HOURS TO REACH THE EDUCATION MINIMUM FOR EACH GRADE AND LEVEL OF EDUCATION

	Grades	Primary					Lower-secondary					Upper-secondary					Total	
		Grades				Total	Grades				Total	Total	Grades					Total
		I	II	III	IV	I-IV	V	VI	VII	VIII	V-VIII	I-VIII	IX	X	XI	XII		IX-XII
	No of school weeks	31	32	32	32		34	34	34	34			36	36	36	31		
A.	Compulsory classes	589	640	736	736	2701	918	918	918	918	3672	6373	972	720	360	186	2238	8611
B.	Compulsory elective classes	93	64	64	64	285	102	102	102	102	408	693	180	432	792	806	2210	2903
	Total compulsory classes	682	704	800	800	2986	1020	1020	1020	1020	4080	7066	1152	1152	1152	992	4448	11514
C.	Free elective classes	124	128	128	128	508	136	136	136	136	544	1052	144	144	144	124	556	1608
	Total class hours	806	832	928	928	3494	1156	1156	1156	1156	4624	8118	1296	1296	1296	1116	5004	13122

Source: MES, 2001c. Official Document. Bulgaria.

NB: The school-based curriculum covers only free elective classes. Compulsory electives are not part of the school-based curriculum. They are determined by the profile of the school and the class hours allocated to them must be used for subjects consistent with the profile.

ANNEX 15. STUDENT ASSESSMENT METHODS FOR FRENCH LANGUAGE

<p>In upper-secondary education student achievements in spoken and written language are assessed depending on the study program they have chosen to follow:</p>	
⇒	<p>in assessing the achievement of students who study French as a first foreign language under the compulsory program for general education schools preference is given to spoken language and comprehension</p>
⇒	<p>in assessing the achievement of students who study French under the program for profile-oriented schools spoken and written language have equal weight.</p>
<p>Assessment is based on a constant and direct monitoring of the progress of individual students, as well as the class as a whole. Grades are explained thoroughly to the students and reflect their progress in mastering the required content. The key principles in assessment are objectivity, validity and reliability. The objective is:</p>	
⇒	<p>to reflect the actual knowledge and skills acquired by the student and to compare them with the expected results, as described in the study program;</p>
⇒	<p>to help students develop criteria for objective assessment and self-assessment that would motivate them to strive for better results</p>
⇒	<p>to provide data on students' achievements that would help teachers analyze and optimize the teaching and learning process.</p>
<p>Assessment should serve as a mean to encourage students and motivate them to communicate in French. In assessing students' progress in mastering the content for 9th and 10th grade, the following should be taken into account:</p>	
⇒	<p>the ability of the student to express his thoughts on a familiar topic clearly and coherently</p>
⇒	<p>the ability of the student to choose the appropriate style and language that would be relevant to the communicative situation</p>
⇒	<p>the ability of the student to use a grammatically correct language</p>
⇒	<p>the ability of the student to speak on a given topic, expressing opinions and presenting arguments</p>
<p>Assessment methods should vary and should evaluate students' achievements through different activities:</p>	
⇒	<p>class work (individually, in a group or with the whole class)</p>
⇒	<p>homework</p>
⇒	<p>work under group projects</p>
⇒	<p>work under individual projects and presentations</p>
⇒	<p>complex assessment of written and spoken language skills through ongoing tests.</p>

Source: MES, 2003c. Official Document. Bulgaria.

NB: Specified in the introductory notes to the study plans for French language for upper-secondary education.

ANNEX 16. REGULATIONS ON THE UNIFIED STATE STANDARDS FOR OBTAINING TEACHING CAPACITY

Article 7

(1) The compulsory subjects [*which students have to cover in order to obtain teaching capacity*] and the minimum number of academic hours, allocated to each subject shall be as follows:

- | | |
|--|---------------------|
| 1. pedagogy (theory of teaching and didactics) | – 60 academic hours |
| 2. psychology (general, child psychology, psychology of education) | – 45 academic hours |
| 3. audio-visual and information technologies in education | – 15 academic hours |
| 4. methodology of teaching the chosen subject | – 60 academic hours |

Article 8

(1) Elective subjects shall be taught in at least 15 academic hours each and shall be divided in the following two groups:

1. Pedagogical, psychological and methodological subjects
 2. Interdisciplinary, applied and experimental subjects, related to the area in which the teacher specializes.
- (2) Students shall be obliged to choose one or two subjects from each of the groups listed above.

Article 9

Practical training shall be provided in forms and academic hour allocations as described below:

1. Monitoring and analysis of classroom lessons – 30 academic hours
2. Ongoing teaching practice – 45 academic hours
3. Pre-graduation teaching practice – 75 academic hours

Article 10

Students shall monitor and analyze classroom lessons and other forms of teaching under the immediate guidance of university professors.

Article 11

Ongoing teaching practice shall include visits to schools with a view to monitoring classroom lessons and other forms of teaching. The ongoing teaching practice shall be designed to give students the opportunity to prepare for the pre-graduation teaching practice.

Article 12

- (1) During the pre-graduation teaching practice students shall give lessons to actual classes under the guidance of a schoolteacher or a university professor.
- (2) The number of lessons with new content, which each student shall be required to present, shall range between 10 and 22.

[...]

Article 15

- (1) To obtain professional teaching capacity students shall be required to take an integrated practical and theoretical state exam.
- (2) The state exam mentioned in paragraph (1) shall consist of practical and theoretical presentation of a classroom lesson.

Article 16

- (1) The state exam shall be taken before a State Examination Commission, the members of which shall be determined with a written ordinance of the Rector.
- (2) The State Examination Commission shall include the schoolteacher, which has monitored the pre-graduation teaching practice described in Article 12.

Source: MES, 1997a. Official Document. Bulgaria.

**ANNEX 17. EXAMPLE OF IN-SERVICE TEACHER TRAINING COURSES FOR SECONDARY SCHOOL
TEACHERS**

HUMANITIES AND CIVIC EDUCATION	
	<u>Bulgarian Language and Literature</u>
•	<p>Courses offered at the teacher training facility in Sofia</p> <p><i>Research activities for teachers of Bulgarian language and literature</i> General trends in teachers' research in EU Member States; traditions and modern school practices; research possibilities in Bulgarian language and literature <u>Course duration: 72 class hours</u></p> <p><i>Teaching secondary school students to produce texts</i> Students' writing skills in the Bulgarian educational tradition and the international practice; main types of written and oral statements in school; how to teach communication and expression skills; how to evaluate students' writing. <u>Course duration: 36 class hours</u></p> <p><i>New education technologies in teaching Bulgarian language and literature</i> The new roles of teachers and students in the teaching and learning process and in the information society; new information and communication technologies in the education strategies of EU Member States; MES strategy for introducing information and communication technologies in Bulgarian schools; didactic applications of information and communication technologies in teaching Bulgarian language and literature. <u>Course duration: 36 class hours</u></p> <p><i>The dialogic approach to teaching Bulgarian language and literature</i> Communication, texts, and dialog in the information society; dialog at the different levels of communication in the process of teaching Bulgarian language and literature; methods for establishing a dialog in the classroom; methods for introducing new topics. <u>Course duration: 36 class hours</u></p> <p><i>Organization of the teaching and learning process in Bulgarian language and literature</i> The new content for Bulgarian language and literature: how to plan school activities; how to teach students to perform different tasks (linguistic analysis, editing, writing texts, analyzing literary texts, making comments); how to work with linguistic and literary theory concepts; how to control and assess students' knowledge and skills; how to conduct self-assessment of teachers' performance. <u>Course duration: 36 class hours</u></p> <p><i>Working with literary texts</i> General trends in the education strategies of EU Member States; meanings and communicative aspects of a literary work; social functions of the literary discourse; approaches to studying literary texts in school; education in Bulgarian language and literature and civic education. <u>Course duration: 36 class hours</u></p> <p><i>Information technologies in teaching Bulgarian language and literature</i> Word processing; use of computers in teaching Bulgarian language and literature <u>Course duration: 36 class hours</u></p>
•	<p>Courses offered locally</p> <p><i>Teaching Bulgarian language and literature to bilingual students</i> Intercultural approaches to teaching Bulgarian language and literature to bilingual students; development of language proficiency and discourse and sociolinguistic competencies. <u>Course duration: 36 class hours</u></p>
•	<p>Courses, financed by the commissioning institution</p> <p><i>Integrative interactions in education</i> Psychological and didactic aspects of teaching subjects in the humanities and the arts; modern education technologies; interdisciplinary links between subjects <u>Course duration: 200 class hours</u></p> <p><i>Teaching Bulgarian language and literature in a foreign language environment – for teachers in Bulgarian communities abroad</i> Specifics of teaching Bulgarian language and literature in a foreign language environment; development of language proficiency and discourse and sociolinguistic competencies; key phenomena and processes in Bulgarian culture and arts.</p>

Course duration: two weeks or one month

English language

• **Courses offered at the teacher training facility in Sofia**

Exchange of information, approaches and practices among English language teachers

Exchange of information, experience, approaches and practices; planning and coordinating activities in English language teaching.

Course duration: 14 class hours

Modern training kits for teaching English language in upper secondary school

General presentation of new training kits; relevance between National Education Standards, curricula and training kits; criteria for choosing the most appropriate training kit, practical tips on using training kits in the classroom.

Course duration: 14 class hours

Research activities for teachers of English language

Theoretical and methodological aspects of the education strategy in teaching English language; non-traditional approaches and methods; research possibilities in English language teaching.

Course duration: 72 class hours

Teaching school subjects in a foreign language

Integrated teaching of a school subject and a foreign language; developing foreign language proficiency by teaching school subjects in the foreign language; use of information technologies in the classroom; evaluation and self-evaluation; control and assessment of students' achievements.

Course duration: 72 class hours

Teaching literature in profile-oriented foreign language teaching schools

Specifics of teaching foreign languages through literature; today's students and literature; teaching literature from a cultural studies perspective; practical ideas applicable in the classroom.

Course duration: 22 class hours

Intensive English language teaching in 8th grade of profile-oriented schools

National Education Standards; English language curriculum for 8th grade of profile-oriented schools; principles; specifics of intensive foreign language teaching; organization, planning, and individualization of the teaching and learning process; creative approach to textbooks; control and assessment of students' knowledge and skills; adapting and developing additional materials to complement the textbook; developing tests; planning individual assignments.

Course duration: 42 class hours

Organizational skills and professional capacity of English language teachers

The National Education Standards for the content of education and the new English language curricula; planning the teaching and learning process; education methods, means, and techniques; individualization of teaching activities; learning strategies; control and assessment of students' achievements; new technologies in teaching English.

Course duration: 36 class hours

New information and communication technologies in English language classrooms

Introduction to information technologies; modern technologies and individualization of teaching activities; application of modern technologies in controlling and assessing students' achievements.

Course duration: 52 class hours

Integrative approaches to English language education content (summer school)

Practice-oriented seminar to improve the capacity of full-time English language teachers in Bulgarian secondary schools. The seminar is organized in partnership with the British Council

Course duration: 82 class hours

• **Courses offered locally**

New trends in English language teaching

Modern approaches to English language teaching; European practices; European Language Portfolio

Course duration: 24 class hours

• **Courses, financed by the commissioning institution**

Intercultural education for foreign language teachers

Four distance learning modules, as follows: 1) Theoretical concepts: culture and intercultural communication; 2) Subject-related methods for addressing cultural issues; 3) Foreign language teaching approaches; 4) Research activities for English language teachers.

Course duration: 200 class hours

Integrative interactions in education

Psychological and didactic aspects of teaching subjects in the humanities and the arts; modern education technologies; interdisciplinary links between subjects

Course duration: 200 class hours

Other subjects

Similar courses are offered for teachers in German, Russian, and French Language. Partners include KulturKontakt – Austria, Goethe Institute – Sofia, French Cultural Institute – Sofia.

NATURAL SCIENCES, MATHEMATICS, AND TECHNOLOGY

The Department for Information and In-service Teacher Training offers training courses for teachers in each of the natural sciences, mathematics, and technology subjects. The program is designed to provide teachers with the necessary capacity and skills to:

- organize the teaching and learning process
- implement new methods and approaches
- prepare students for national matriculation exams or state exams for vocational schools
- use information technologies and innovations
- assess students' achievements
- organize research activities
- cope with the new school documentation required for upper secondary education.

As with humanitarian subjects, courses are offered at the teacher training facility in Sofia or locally. Many courses in both humanitarian and non-humanitarian subjects are organized in partnership with the Ministry of Education and Science, and are designed to reflect new developments in education policy.

Source: 2004. In-service Teachers Training Institute, University of Sofia, Sofia, Bulgaria.

ANNEX 18. LIST OF INTERVIEWEES BY PROFESSION

All interviews held in person and recorded during two study visits in Sofia, Bulgaria in November 2003 and September 2004, and in Bucharest in February 2007.

CATEGORY OF ADMINISTRATIVE STAFF	
Ministry Officials at MES	
Ventzeslav Panchev	Former Deputy Minister for General Education (1997-1999). Currently Expert on Education at the Open Society Institute, Sofia/ Professor at the Department of In-service Teacher Training at the University of Sofia
Alexander Lakiurski	Head of the National Assessment Unit
Gergana Doynova	Chief Expert at the National Assessment Unit
Georgi Simidchiev	Former Head of the National Assessment Unit. Currently Teacher and University Lecturer/ Expert on Mathematics and Information Technology
Dilyana Mikova	Former Head of the General Education Directorate (1998-2001), Expert on Bulgarian Language and Literature Curriculum
Julian Nakov	Deputy Minister on General Education Head of the Inter-institutional Council for the Curriculum
Liliana Drumeva	Head of the Teachers' Training Directorate
Sevdalina Ivanova	Expert on Natural Sciences
Nadejda Todorova	Head of Textbook Approval Directorate
Evgenia Kostadinova	Head of General Education Policy Directorate
Elka Dobрева	Head of Teachers' Qualification department, Teachers Training Directorate
Sofia Dimitrova	Director of the General Education Policy Directorate
Albena Chupetlovska	Expert in Civic education, Inter-institutional Council for the Curriculum
Hristina Markova	Expert in Civic education, Inter-institutional Council for the Curriculum
Evgenia Kostadinova	Expert in Bulgarian language and literature, Inter-institutional Council for the Curriculum
Milena Ivanova	Expert in Bulgarian language and literature, Inter-institutional Council for the Curriculum
Krasimira Alexandrova	Expert in Bulgarian language and literature, Inter-institutional Council for the Curriculum
Chavdar Zdravchev	Expert in Foreign languages education, Inter-institutional Council for the Curriculum
Veselina Popova	Expert in Foreign languages education, Inter-institutional Council for the Curriculum
Mihail Ivanov	Member of National Council for Ethnic and Demographic Issues, Council of Ministers
Ofelia Krumova	Member of Educational and Cultural Integration Department
Greta Gancheva	Member of Special Education Needs Directorate
Boika Palikarska	Former Head of General Education Policy Directorate
Georgui Simidchiev	Former Director of the National Assessment Unit
Iossif Nunev	Expert on Roma Integration, Educational and Cultural Integration Department

Annexes

Ventseslav Pencho	Former Deputy Minister for School Education, 1998-2000
Mariana Nesheva	Member of Textbook Approval Commission
Nadejda Todorova	Member of Textbook Approval Commission
Tzonka Kenarova	Director of Teachers Qualification and Career Development Directorate
Tanya Lukanova	Chief Expert, Centre for Control Assessment of the Quality in Education
Luba Popova	VET consultant, GOPA VET center, GOPA office Sofia
Maria Todorova	Executive Director, Institute for International Cooperation at the Association of the German Popular Universities
Inspectors from Sofia Inspectorate	
Zvezdeva	Head of the Regional Inspectorate – Sofia, 2003
Nikolova	Head of the Regional Inspectorate, Sofia, 2004
Ten inspectors-experts from all secondary education subjects, methodology and finance	Regional Inspectorate, Sofia
School Directors	
Nina Chaneva	Director 23 rd General Comprehensive School, Sofia President of the Sofia-branch of the Employers in Education Association
	President of the School Board of the 23 rd School, Sofia
Nadejda Nikolcheva	Director of the 31 st General Education School
Velina Georgieva	Deputy Head of the 31 st General Education School
Directors of Unions	
Yanka Takeva	Chairperson of the Bulgarian Teachers' Union
Teodora Borissova	Director of training, Bulgarian Industrial Association
SOCIAL GROUP CATEGORY	
Parents	
President of Parents Association of the 23 rd General Comprehensive School, Sofia	
Members of NGOs	
Maria Donkova	Member of the Board of Paideia Foundation /Worked on the Elaboration of the new Civic Education Curriculum / Author of textbooks in History and Civilization
Neda Kristanova	Education program coordinator, Open Society Foundation Sofia
Members of Publishing houses	
Boika Palikarska	Textbook Editor and Manager Colibri publishing house
Vesselin Todorov	President Association of the Bulgarian Textbook Publishers
Students	
Ten secondary education students at the 31 st General Education School	
Ten secondary education students at the 23 rd General Comprehensive School, Sofia	
Three university Students department of Philosophy	
CATEGORY OF EDUCATORS	
University Professors	
Albena Hranova	Professor of Bulgarian Language and Literature, New Bulgarian University

Annexes

Ivan Kolev	University Professor of Civic Education / Author of Textbooks in Civic Education / Editor of the SOCRATES Journal for High School Students
Maya Grekova	Head of the Department of Sociology at the University of Sofia /Author of Textbooks on Sociology and Civic Education for Secondary Education / Member of the Inter-institutional Council for the Curriculum
Tatiana Angelova	Professor of Methodology for Teaching Bulgarian Language and Literature, University of Sofia
Petia Kabakchieva	Professor of Sociology at the University of Sofia
Plamen Makariev	Head of Department, Faculty of Philosophy, Sofia University
Valeri Stefanov	Dean, Faculty of Slavic studies, Sofia University
Teodora Petrova	Vice- Dean Curriculum and Instruction, Faculty of Journalism, Sofia University
Konstantinova Zdravka	Vice-Dean Curriculum and Instruction, Faculty of Journalism, Sofia University
Vessela Antonova	Department of French Philology, Faculty of Classical and Modern Philology, Sofia University
Teachers of secondary education	
Mariana Bakardjieva	Teacher in Bulgarian language, 9 th French Language Gymnasium, Sofia
Lili Velusheva	Teacher in Spanish language, 1 st General Comprehensive School, Sofia
Daniela Dobreva	Teacher in Philosophy and Social Studies, 12 th General Comprehensive School, Sofia
In-service teachers trainer	
Rumiana Kusheva	Director of the Department for In-service Teacher Training at the University of Sofia
Members of Teachers Unions	
Four members	Bulgarian Teachers' Syndicate in Sofia

ANNEX 19. LIST OF QUESTIONNAIRE'S RESPONDENTS

- 10 Ministry officials from the Directorate of: General Education Policy; Teachers' Training; Textbook approval; Special Education Needs; Ethnic Minorities; Inter-institutional Council for the Curriculum.
- 5 Experts from two NGOs: Paideia Foundation and Open Society
- 5 members of Teachers' Union in Sofia;
- 32 experts-inspectors at 26 out of the 28 Regional Inspectorates on Education which exist in Bulgaria. Those include the following towns across Bulgaria: Blagoevgrad, Bourgas, Dobrich, Gabrovo, Haskovo, Kurdjali, Kyustendil, Lovech, Montana, Pazardjik, Pleven, Plovdiv, Razgrad, Rouse, Shoumen, Silistra, Sliven, Smolyan, Sofia, Stara Zagora, Turgovishte, Varna, Veliko Turnovo, Vidin, Vratza, and Yambol.
- 112 Teachers from the 46 towns which cover virtually the whole territory of Bulgaria and are representative of both small, medium-sized, and large communities. Those are: Archar (Vidin District¹⁰⁶), Barkachevo (Biala Slatina District), Biala (Rouse District), Blagoevgrad, Bourgas, Chernoochene (Kurdjali District), Dimitrovgrad, Dobrich, Gabrovo, Gorna Oriahovitsa, Gotze Delchev, Harmanli (Haskovo District), Haskovo, Kozloduy (Rouse District), Kurdjali, Kyustendil, Lom, Lovech, Mezdra (Vratza District), Mizia (Vratza District), Montana, Okorsh (Silistra District), Pazardjik, Peshtera (Smolyan District), Pleven, Plovdiv, Razgrad, Razlog, Rouse, Shoumen, Silistra, Simitli (Blagoevgrad District), Sliven, Smolyan, Sofia, Sokolare (Biala Slatina District), Sozopol (Bourgas District), Stara Zagora, Svishtov, Turgovishte, Varna, Veliko Turnovo, Velingrad, Vidin, Vratza, and Yambol.
- 13 University professors from the University of Sofia from the Departments of Bulgarian Language, Bulgarian literature, Sociology, Philosophy, Mathematics; French Philology; Slavic languages.
- 24 students from the same university from the Departments of Bulgarian Language, Bulgarian literature, Greek Philology, Philosophy, History and Geography.

¹⁰⁶ For clarity, smaller towns and villages are shown with the district they belong to, written in brackets

ANNEX 20. GUIDING QUESTIONS FOR INTERVIEWS

MINISTRY OFFICIALS IN CHARGE OF EDUCATION POLICY

- 1) How the several reforms are being communicated to the public? What measures have you adopted in order to enhance a public dialogue?
- 2) What are the principal problems you have faced in order to implement the education reform in the areas of curriculum, assessment, textbooks, inspection, teachers training? Have you faced any resistance and if yes by whom?
- 3) What is the current situation with the matriculation exam?
 - a. What will be the function of the matriculation exam? A general education exit exam or a university entry exam? or both?
 - b. Are you planning to adopt new assessment standards? If yes, how are they will be organized and administered?
 - c. Will be introduced national exams after the 4th, 8th and 12th grade? If yes, how they will be organized and administered?
- 4) Is there any research or sustainable mechanism developed in order to collect the feedback of the beneficiaries of the reform? (students, teachers, etc.)
- 5) What are the current education priorities for the MES?
 - a. What changes are you planning to implement regarding the teachers training?
 - b. What changes are you planning to implement regarding the school inspection?
 - c. What are the current education policy priorities for the MES?

MINISTRY OFFICIALS RESPONSIBLE FOR CURRICULUM

- 1) Which were the social, political and economic factors that motivated curricular reforms in the country?
- 2) What was the process followed to design the new school curriculum?
- 3) How has the curriculum reform been implemented in chronological order? Were there any delays in its implementation ?
- 4) Which were the main problems encountered in order to implement the designed curriculum?
- 5) Is there any research or sustainable mechanism developed in order to collect the feedback of the beneficiaries of the reform? (e.g. students, teachers, etc.)
- 6) Could you please identify the main differences/changes between the old and the new curricula for secondary education?
 - a) Which are the subjects excluded from the secondary curriculum after the democratization?
 - b) Which are the subjects remained in the secondary curriculum but reviewed to eliminate the ideological elements?

- c) Which new learning areas have emerged and how were incorporated into the secondary school curriculum?
- d) What changes in the time allocation of the subjects have been made in the school timetable?
- 7) Does the current educational content reflect the national education standards?

MINISTRY OFFICIALS RESPONSIBLE FOR ASSESSMENT

- 1) How is the secondary school-leaving examination being managed and administered?
- 2) Which subjects are being assessed in the school-leaving examination? Why those?
- 3) In the school-leaving examination, which is the subject that students choose more frequently (if they have the right for option) and why in your opinion they choose this one?
- 4) How do you think that the school-leaving examination affect the curriculum and teaching practice in classroom?
- 5) Why the introduction of the new Matura examination to become compulsory for all secondary school leavers without exceptions has been postponed?
- 6) What has been done to adjust the target level of the examination so as to cover the whole ability range?
- 7) Have they been analyzed the results of the pilot matriculation exam? Have they been communicated to the teachers and school directors?
- 8) What criteria and standards would be used to evaluate the results of the new matriculation exam?
- 9) Will be introduced national exams after the 4th and 8th grades as well? If yes, how are they will be organized and administered?
- 10) Does the revised evaluation process provide any kind of accommodations for the pupils of different ethnicity or those with special needs? (e.g. additional time, use of dictionary, etc.)?

MINISTRY OFFICIALS, MEMBERS OF THE TEXTBOOK APPROVAL COMMISSION

- 1) Which are the major policy changes accompanying the curriculum reform in terms of textbook development and instructional resources? (Ministry Guidelines, selection and evaluation criteria, etc.).
- 2) What is the current process of selecting and approving textbooks?
- 3) How difficult has been for authors and publishers to produce new textbooks according to the new curriculum?
- 4) Who are the authors of the new textbooks?
- 5) Do you think there are enough quality authors to produce the new textbooks?
- 6) What has been done in order to improve the content of the new textbooks?
- 7) To what extend do you think teachers rely on textbooks to prepare and manage their daily classroom sessions?
- 8) Is there a policy concerning instructional materials other than textbooks? Are there course packages of any kind? To what extent is ICT gaining ground in secondary schools?
- 9) Is there any regulation to ensure free textbooks for needy children?

INSPECTORS IN THE REGIONAL INSPECTORATE OF SOFIA

- 1) Which are the major policy changes accompanying the curriculum reform in terms of secondary school inspection / secondary school supervision?
- 2) How is the secondary school inspection managed and administered?
- 3) What is the structure and the functions of the Inspectorate in secondary schools?
- 4) What are the specific responsibilities of the Inspectorate's experts?
- 5) What are the qualifications of the experts in the inspectorate?
- 6) What is the status of the inspectorate's experts in schools?
- 7) How is the relationship of inspectorate's experts with teachers and students?
- 8) What are the criteria based on which you analyze and evaluate:
 - a) the quality of the curriculum and of extra-curricular activities?
 - b) the quality of the teaching process and teachers' competences?
 - c) the quality of the relationship with parents?
- 9) Has the new Framework for school inspection been adopted?
- 10) What is the outcome of the evaluation of the school assessment organized by the inspectorate in Sofia during the academic year 2003-2004?
- 11) Are the new national standards for inspection under preparation? When they will be adopted? Can you nominate some of the standards?
- 12) How often school inspection takes place?
- 13) How are being used the findings of the school inspection?
- 14) What changes you think should be made to the current inspection system?
- 15) What was the participation of teachers in the *decision-making process* of the curriculum reform?
- 16) How have teachers been motivated for active participation in the reform?
- 17) What forms of resistance from teachers, if any, were encountered during the *design* of the new curriculum? How were they overcome?
- 18) How has the new curriculum been communicated to them?
- 19) What was the participation of teachers in the *implementation* of the curriculum reform?
- 20) What forms of resistance from teachers, if any, were encountered during the *implementation* of the new curriculum? How were they overcome?
- 21) What problems have been faced in order to implement the new curriculum?
- 22) Have been teachers fully informed about the new attainment targets?
- 23) What were the consequences of the curriculum reform on their teaching methods and interaction with students?
- 24) Did the curriculum reform have any consequences on the autonomy of teachers? (e.g. *more freedom in their teaching methods, in the choice of textbooks and additional educational materials they use*)
- 25) What is traditionally the degree of collaboration between teachers and school inspectors? Did the reform affect (helped or worsen) their collaboration?

- 26) Are teachers satisfied with the *in-service* or *pre-service* training that is provided under the secondary education reform? (e.g. satisfactory training on working in diverse classrooms, interact with students, implement the new curriculum, etc.)

DIRECTOR AND TRAINERS AT THE IN-SERVICE TEACHER TRAINING INSTITUTION IN SOFIA

- 1) Which are the major policy changes accompanying the curriculum reform in terms of teacher education and teacher accountability at the secondary level?
- 2) How have teachers been motivated for active participation in the reform?
- 3) What changes took place in the curriculum and the objectives of *in-service* training programs to be aligned with the new attainment targets? (Please describe analytically the curriculum and seminars provided)
- 4) Are teachers being instructed to work in diverse classrooms? (for example, to work with pupils of different ethnicities or disable pupils, etc.).
- 5) What changes have been made to the teaching methodology and classroom management to stimulate the interest of children, motivate their participation in classroom and attract and maintain a large percentage of them at school?
- 6) Did the level of qualification of teachers change due to the reform? If yes, how?
- 7) What are the primary objectives of in-service training at the **lower/upper secondary** level? Which skills and knowledge in-service training aim to upgrade?
- 8) Who decides which in-service training courses should be offered? Who decides which in-service training courses a teacher should receive?
- 9) What are the challenges to deliver quality in-service training that is effective for improving teachers' capacity and promote student learning? Please give some examples.
- 10) How is it organized the new qualification system for teachers currently under development?
- 11) What is the link/collaboration between the teacher training institution providing in-service training and the universities where pre-service education takes place?
- 12) Changes/actions in place
 - a. Explain new/recent policies implemented in teacher training system at the **lower/upper secondary** level. Why were these changes implemented?
 - b. Have you seen any impact? How will you know if these policies are effective?
- 13) Future policy
 - a. What are the key tenets of current teacher education policy?
 - b. What direction should **lower/upper secondary** teacher training policy take? What area is most in need for immediate attention? Why?

TEACHERS (INDIVIDUALS)

- 1) What was the participation of teachers in the *decision-making process* of the curriculum reform?
- 2) How have teachers been motivated for active participation in the reform?
- 3) What forms of resistance from teachers, if any, were encountered during the design of the new curriculum?
How were they overcome?
- 4) How has the new curriculum been introduced to them?
- 5) What was the participation of teachers in the *implementation* of the curriculum reform?
- 6) What forms of resistance from teachers, if any, were encountered during the implementation of the new curriculum? How were they overcome?
- 7) What problems have you faced in order to teach under the new curriculum?
- 8) Have you been fully informed about the new attainment targets and the new national standards?
- 9) What are the consequences of the curriculum reform on your teaching methods and interaction with your students?
- 10) Did the curriculum reform have any consequences on the autonomy of teachers? (*e.g. more freedom in their teaching methods, in the choice of textbooks and additional educational materials they use*).
- 11) Do you think that the content of secondary education and its organization has been improved due to the reform? Is it more relevant to the current Bulgarian society?
- 12) Do you think that the new curriculum and programmes of study differ essentially from the old one?
- 13) Does the current educational content reflect the national education standards? Are the curricula and the programmes of study standard-based?
- 14) Which are the most important changes in the curriculum and programmes of study according to your opinion?
- 15) What do you think on the quality of textbooks? Do you think they cover the new national education standards?
- 16) Do you think What about the price of the new textbooks is appropriate?
- 17) What problems did you face to teach with the new textbooks?
- 18) How do you define a good textbook?
- 19) What is traditionally the degree of collaboration between teachers and school inspectors? Did the reform affect (helped or worsen) their collaboration?
- 20) Have you received any training in order to teach under the new curriculum? If yes, what kind of training and for how long?
- 21) Do you think that current students in the University who study to become future teachers for secondary schools receive a good and relevant education in order to teach in the reformed education system?
- 22) Does the new content of education changes the students themselves? Encourages them to think or to be more active?
- 23) What is the opinion of parents regarding the new education standards and the new programs of study?

- 24) Have you changed your methods of teaching due to the new national standards and the new curricula? In which sense?
- 25) What is high quality of education for you?
- 26) Do you think the new national standards and programmes of study have a positive impact on the quality of education?
- 27) Do you think the new assessment system can help to evaluate performance better or enhance quality improvement?
- 28) Are you in favor of introducing a new external Matriculation exam?
- 29) According to your opinion, what should be the function of the matriculation exam? A general education exit exam or a university entry exam?
- 30) Do you think the adoption of new assessment standards would improve the quality of education?

TEACHERS' UNIONS

- 1) What was the participation of teachers (and – separately - of teacher's unions) in the *decision-making process* of the curriculum reform?
- 2) How have teachers (and – separately - of teacher's unions) been motivated for active participation in the reform?
- 3) What forms of resistance from teachers (and – separately – from the teacher's unions), if any, were encountered during the design of the new curriculum ? How were they overcome?
- 4) How has the new curriculum communicated to them?
- 5) What was the participation of teachers (and – separately – of teacher's unions) in the *implementation* of the curriculum reform?
- 6) What forms of resistance from teachers (and – separately - from teacher's unions), if any, were encountered during the implementation of the new curriculum ? How were they overcome?
- 7) What problems have been faced in order to implement the new curriculum for *mother tongue instruction, foreign languages and social studies*?
- 8) Have been teachers (and – separately - teacher's unions) fully informed about the new attainment targets?
- 9) What were the consequences of the curriculum reform on their teaching methods and interaction with students?
- 10) Did the curriculum reform have any consequences on the autonomy of teachers? (*e.g. more freedom in their teaching methods, in the choice of textbooks and additional educational materials they use*).
- 11) What is traditionally the degree of collaboration between teachers and school inspectors? Did the reform affect (helped or worsen) their collaboration?
- 12) Are teachers satisfied with the *in-service* or *pre-service* training provided under the secondary education reform? (e.g. satisfactory training on: working in diverse classrooms, interact with students, implement the new curriculum, etc.)

SCHOOL PRINCIPALS

- 1) What was the participation of school directors in the secondary reform?
- 2) What has changed in the school management due to the reform?
- 3) What was the participation of teachers and school directors in the *decision-making process* of the curriculum reform?
- 4) How teachers and school directors have been motivated for active participation in the reform?
- 5) What forms of resistance from teachers, if any, were encountered during the design of the new curriculum? How were they overcome?
- 6) How has the new curriculum communicated to them?
- 7) What was the participation of teachers and school directors in the *implementation* of the curriculum reform?
- 8) What forms of resistance from teachers, if any, were encountered during the implementation of the new curriculum? How were they overcome?
- 9) What problems have been faced in order to implement the new curriculum for *mother tongue instruction, foreign languages and social studies*?
- 10) Have been teachers fully informed about the new attainment targets?
- 11) What were the consequences of the curriculum reform on their teaching methods and interaction with students?
- 12) Did the curriculum reform have any consequences on the autonomy of teachers? (e.g. *more freedom in their teaching methods, in the choice of textbooks and additional educational materials they use*).
- 13) What is traditionally the degree of collaboration between teachers and school inspectors? Did the reform affect (helped or worsen) their collaboration?
- 14) Are teachers satisfied with the in-service or pre-service training that is provided under the secondary education reform? (e.g. *satisfactory training on working in diverse classrooms, interact with students, implement the new curriculum etc.*)
- 15) How often school inspection takes place?
- 16) What are the criteria for evaluating the performance of teachers and school directors?
- 17) How the findings of the school inspection are being used?
- 18) Do you think that the inspection currently works as an effective quality control mechanism?
- 19) What changes should be made to the inspection system?

PROFESSORS FROM THE UNIVERSITY OF SOFIA

- 1) What is your opinion on the situation of secondary education in Bulgaria?
- 2) What is your opinion on the process of the secondary education reform?
- 3) Have you participated in the curriculum reform? How?
- 4) Are young people in Bulgaria motivated today to become teachers? Why?
- 5) What further changes, you think, need to be implemented in the current curriculum in order to improve its quality and relevance?
- 6) How was the curriculum of pre-service training for secondary education teachers structured and organized before 1995 and how is it now after the University became autonomous? Do you find essential differences?
- 7) How are current priorities of teacher training institutions supporting policy aims? Where are they laying their emphasis in the training process?
- 8) Who determines/regulates the curriculum of **lower and upper secondary** teacher training?
- 9) What proportion of the teacher training curriculum is dedicated to each of the following and why?
 - a. Subject matter knowledge
 - b. Pedagogical content knowledge
 - c. General pedagogy or curricular knowledge
 - d. Other areas (specify)
- 10) To what degree is the new lower/upper secondary curriculum integrated into the pre-service teacher training curriculum for lower and upper secondary teachers?
- 11) To what degree are the new national education standards for the curriculum integrated into the teacher-training curriculum for lower and upper secondary teachers?
- 12) Student/practice teaching:
 - a. How long are students (future teachers of **lower/upper secondary education**) required to practice teaching in a real settings (in classroom)?
 - b. What are the factors that make practice teaching an effective training tool?
- 13) What kind of relationship exists between the schools/staff where practice teaching take place and teacher training institutions/instructors?
- 14) What kind of relationship exists between the teacher training institutions and the lower/upper secondary schools where their teacher candidates are assigned?
- 15) Which are the teaching competences and skills that should be incorporated into the curriculum of secondary teacher training, and which are those that should become the preferred focus of teachers' professional development activities and policies?
- 16) Which reform decisions in secondary teacher training are likely to allow a better match between teaching knowledge and skills and desired competences in student learning?
- 17) What is the link between the teacher training institution for in-service training and the universities for pre-service education? Is there any kind of collaboration?

STUDENTS FROM THE UNIVERSITY OF SOFIA

- 1) Do you find the content of the core curriculum relevant to your needs and interests?
- 2) Do you have more freedom now to choose the subjects you want to study according to your needs/interests?
- 3) How is the relationship/interaction with your teachers? Are you satisfied of the way you are being taught.
- 4) Do you feel that you receive the adequate formation in order to teach in the future in real settings?
- 5) If you could change something regarding the subjects or the methodology you are being taught, what would be?
- 6) How is the practice in schools organized? Do you find it satisfactory?
- 7) Can you choose the school to which you will carry out your practice? With what criteria is being chosen?
- 8) What problems do you face during your practice in a certain school?
- 9) Are you informed about the new national standards?
- 10) Do you have the opportunity to study and examine the new textbooks?
- 11) In your opinion, what should be changed in the current secondary education system? Why?

STUDENTS FROM SECONDARY SCHOOLS

- 1) Do you find the content of the core curriculum relevant to your needs and interests?
- 2) Do you have more freedom now to choose the subjects you want to study according to your needs/interests?
- 3) How is the relationship/interaction with your teachers? Are you satisfied of the way you are being taught.
- 4) If you could change something regarding the subjects or the methodology you are being taught, what would be?
- 5) How is the relationship you have with the inspectors? Do you have the opportunity to talk with them and discuss your problems?

REPRESENTATIVES OF PRIVATE PUBLISHING HOUSES

- 1) Are you in favor of the free market for textbooks? Why?
- 2) What difficulties have you encountered, if any, to produce new textbooks?
- 3) Do you think there are enough quality authors to produce new textbooks?
- 4) Do you think the new selection process of textbooks is adequate? Why?
- 5) What do you think should change in order to further improve the quality of school textbooks?

EXPERTS FROM NGO'S

- 1) What was your participation (as member of an ONG) in the secondary curriculum reform? Have you participated in the consultation and/or implementation of the reform? How?
- 2) What has worked really well and what hasn't worked out so well during the curriculum reform?
- 3) What were the difficulties and challenges encountered to implement the curriculum reform?
- 4) What is still pending to be implemented from the government's agenda?
- 5) How NGOs working in the field of education contribute to the improvement of school education?

PARENTS, MEMBERS OF SCHOOL BOARDS

- 1) How have you been informed about the education reform?
- 2) Are you in favor of the changes implemented up to now? Why?
- 3) Do you think the education reform initiated in Bulgarian in 1999 will have a positive impact of the quality of secondary education?
- 4) What was the participation of parents in the decision-making and implementation of the education reform?
- 5) What forms of resistance, problems or obstacles, if any, have generated? How were they overcome?
- 6) What has traditionally been the involvement of parents in school life? Has this changed after the education reform? If yes, in which way?

ANNEX 21A. SAMPLE OF QUESTIONNAIRE IN ENGLISH

**Irene Psifidou,
with the support of the World Bank
and the Greek Government.**

Dear interviewee,

This is a study conducted by Irene Psifidou, a PhD student with the support of the World Bank and the Greek Government. Since the development of national standards for the teaching profession is a high priority in education policy worldwide, this study seeks to identify which teaching competences for **secondary** education teachers (**grades 8-12**), are considered important by different stakeholders and other interferes of the education system in Bulgaria.

The following list of competences is applicable to the profession of a teacher for **secondary school** and it has been designed based on an international list of teachers and competences and those included in the Standards of initial formation for teachers. Please indicate for each competence the level of importance that you consider for the development of competences required to cope with the knowledge based society: no important, indirectly important or directly important (that means indispensable to have or acquire a teacher).

You are a:

- | | |
|----------------------|--------------------------|
| School Director | <input type="checkbox"/> |
| Teacher | <input type="checkbox"/> |
| Teachers Syndicate | <input type="checkbox"/> |
| Head of Inspectorate | <input type="checkbox"/> |
| Inspector | <input type="checkbox"/> |
| University Professor | <input type="checkbox"/> |
| University Student | <input type="checkbox"/> |

DATE AND PLACE

SIGNATURE.....

Degree of importance of Competences for Knowledge Society

Teaching Domain Competences	No important	Indirectly important	Directly important
<i>1. Designing teaching-learning situations for the subject-matter to be learned, and doing so in function of the students and of the development of competencies included in the curriculum</i>			
Mastering ways of representing and formulating the subject matter with the specific purpose of making it comprehensible to others			
Understanding of what makes the learning of specific topics easy or difficult; and the conceptions and preconceptions that students of different ages and backgrounds bring with them to the learning of the most-frequently taught topics and issues.			
Analyzing students' misconceptions concerning the subject matter			
Planning sequences of teaching and evaluation bearing in mind the logic of the content and of the learning process			
<ul style="list-style-type: none"> Knowing the contents of the subject matter and its relation to other subjects 			
<ul style="list-style-type: none"> Knowing about different perspectives and developments in subject matter 			
<ul style="list-style-type: none"> Knowing of sources that provide information on teaching strategies and resources 			
Identifying key elements of the subject matter (concepts, postulates and methods) in order to facilitate meaningful learning for students			
Bearing in mind representations, social differences (sex, ethnic origin, socio-economic, and cultural), needs and special interests of the students			
Choosing varied and appropriate didactic approaches when developing the competencies included in the curriculum			
<ul style="list-style-type: none"> Explaining why certain teaching approaches were selected and is able to describe them 			
Foreseeing situations of learning that enable integration of competencies in varied contexts.			
Recognizing the importance for learning of student prior knowledge, interests and experiences			
<ul style="list-style-type: none"> Knowing about family and cultural background of students 			
<ul style="list-style-type: none"> Being able to describe the different ways of learning of their students 			
<ul style="list-style-type: none"> Uses strategies to put into action student prior knowledge 			
<i>2. Steering teaching-learning situations in order for the content to be learned, and doing so in function of the students and of the development of the competencies included in the curriculum</i>			
Creating the conditions for students to become involved in situations-problems and in significant topics or projects, bearing in mind their cognitive, affective, and social characteristics			
Establishing a learning orientation by starting lessons and activities with advance organizers or previews			
Presenting the subject matter in networks of knowledge structured around powerful ideas			
<ul style="list-style-type: none"> Making it obvious that learning of subject matter is essential 			
<ul style="list-style-type: none"> Establishing a learning environment that invites students to think and act autonomously, even at the risk of error 			
<ul style="list-style-type: none"> Using teaching approaches that allow for more than one response 			

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or that invite thinking about different possibilities			
Making available to students the resources necessary in the learning situations proposed			
Giving students opportunity to learn, dedicating most of the available time to curriculum activities			
Questioning to engage students in sustained discourse structured around powerful ideas			
Guiding students in selecting, interpreting, and understanding the information available			
Shaping students' learning by means of frequent and pertinent strategies, steps, questions, and feedback, so as to help the integration and transfer of learning			
<ul style="list-style-type: none"> • Providing correct, substantive and timely feedback to students • Adequate monitoring of student understanding 			
Giving the students sufficient opportunities to practice and apply what they are learning and to receive improvement-oriented feedback			
<ul style="list-style-type: none"> • Providing all students with opportunities to learn 			
<i>3. Evaluating learning progress and the degree of acquisition of students' competencies in the subject matter to be learned:</i>			
In a learning situation, managing information in order to overcome student's problems and difficulties, and to modify and adapt teaching to sustain students' progress			
<ul style="list-style-type: none"> • Flexibly altering learning activities according to feedback received • Explaining how teaching will be changed according to feedback received 			
Monitoring students' progress using both formal tests and performance evaluations and informal assessments of students' contributions to lessons and work on assignments			
Constructing or employing instruments to enable evaluation of progress and acquisition of competencies and skills			
<ul style="list-style-type: none"> • Planning learning sequences and assessment procedures taking into account both subject matter and learning processes 			
Communicating to students and parents, clearly and explicitly, the results achieved and the feedback concerning progress in learning and acquisition of competence			
Co-operating with the teaching staff to determine the desirable rhythm and stages of progress in the training cycle			
<ul style="list-style-type: none"> • Exchanging ideas with colleagues regarding the appropriateness of the available pedagogical and didactic options 			
<i>4. Planning, organizing, and supervising the way the group-class works, in order to help students learning and socialization processes:</i>			
Defining and applying an effective working system for normal class activities			
<ul style="list-style-type: none"> • Providing students with explicit information on how lesson time will be distributed 			
Communicating clearly to students the requirements of correct school and social behaviour ensuring that they adopt them			
Fostering students' participation – as a group and as individuals – in establishing the norms to work and live together in the classroom			
<ul style="list-style-type: none"> • Fostering student participation by having everyone participate in the generation of behavioural norms, or at least insuring they are known by all 			
Adopting strategies to prevent incorrect behavior cropping up, and intervening effectively when it does			

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<i>5. Adopting teaching to student diversity</i>			
Designing learning tasks adapted to students' possibilities and characteristics			
Foreseeing learning situations that allow for an integration of competencies in different contexts			
Organizing different learning rhythms adapted to students' possibilities and characteristics			
<ul style="list-style-type: none"> Setting learning objectives that allow for a wide spectrum of cognitive processes 			
Organizing heterogeneous groups for students to work together			
Helping the social integration of students with learning or behavioral difficulties			
Seeking pertinent information regarding students' needs			
Participating in the preparation and implementation of a plan of adapted performance			
<i>6. Integrating the technologies of information and communication into the preparation and development of teaching-learning activities, classroom management, and professional development.</i>			
Adopting a critical and well-founded attitude to the advantages and limitation of ICT as medium for teaching and learning for society			
Evaluating the pedagogical potential of ICT			
Using a variety of multimedia tools for communication, using the ICT effectively to investigate, interpret, and communicate information, and to resolve problems			
Using the ICT effectively to set up networks of exchange related with the subject taught and its pedagogical practice			
Helping students use the ICT in their learning activities, to evaluate such use, and to analyze critically the data gathered by these networks			
<i>7. Communicating clearly and correctly, both oral and written, in the different contexts related with the teaching profession:</i>			
Using the appropriate oral language when addressing students, parents, or colleagues			
<ul style="list-style-type: none"> Presenting clearly the purposes of each lesson 			
Respecting the rules of written language in documents aimed at students, parents and colleagues			
Knowing how to take a position, and maintain one's ideas and discuss coherently, effectively, constructively and respectfully.			
Using questions to stimulate students to process and reflect on content, recognize relationships among and implications of its key ideas, think critically about it, and use it in problem solving, decision making, and other higher-order applications			
Communicating ideas rigorously, using precise vocabulary and correct syntax; correcting errors made by students in their oral and written work; constantly, seeking to improve oral and written experience			
School Domain Competences	No important	Indirectly important	Directly important
<i>1. Co-operating with the school staff, with parents, and with the various social agents to achieve the school's educational targets:</i>			
Co-operating with the other members of the school staff in defining targets, and in the preparation and putting into effect of projects on educational services			
Promoting participation and the flow of relevant information to parents			
Encouraging student participation in the management of the school and its activities and projects			

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<i>2. Working in co-operation with the other members of the teaching staff in tasks enabling the development and evaluation of the explicit competencies of the training plan, and doing so in function of the students:</i>			
Knowing which are the situations requiring collaboration with other members of the pedagogical team for the design and adaptation of teaching-learning situations and the evaluation of learning			
Working to achieve the required consensus among the members of the teaching staff			
Professional Domain Competences	No important	Indirectly important	Directly important
<i>1. Acting critically as a professional, interpreting the objects of knowledge or culture in performing one's functions:</i>			
Identifying the core issues and the axes (concepts, postulates, and methods) of knowledge in the subject in order to facilitate students' meaningful learning			
Critically distancing oneself from the subject taught			
<ul style="list-style-type: none"> Reflecting about practice and acting upon the results of such reflection 			
Explaining adequately the degree to which students achieved desired learning targets			
Establishing relationships between the cultural background embedded in the prescribed curriculum and that of the students			
Making the class a place open to multiple viewpoints			
Taking a critical look at one's own origins and cultural practices, and at one's social role			
Establishing relationships among different fields of the subject matter knowledge.			
<i>2. Becoming involved in an individual and collective project of professional development:</i>			
Evaluating one's own competencies and adopting the means to develop them using available resources			
Exchanging ideas with colleagues about the suitability of pedagogical and didactic options			
Reflecting on one's practice, and putting the results into practice			
Encouraging colleagues to participate in research aimed at the acquisition of competencies set out in the training plan and educational targets of the school			
<i>3. Acting ethically and responsibly in the performance of functions:</i>			
Being aware of the values at stake in one's performance			
<ul style="list-style-type: none"> Attributing learning mainly to factors related to the teaching-learning process Interpreting student learning difficulties as a challenge to be met 			
Dealing pedagogically with student negative comments			
Encouraging democratic conduct in class. Giving students due attention and support			
<ul style="list-style-type: none"> Allowing for differences in postures and points of view among students 			
Keeping high expectations: believing that the students are capable of learning and that they are capable of and responsible for teaching them successfully			
Explaining, in function of the public interest, the decisions taken concerning students' learning and education			
Respecting the confidential aspects of the profession			
Avoiding all forms of discrimination by students, parents, and colleagues			

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Making judicious use of the legal and authorized framework governing the profession			
<ul style="list-style-type: none">Knowing about national educational policies related to the curriculum, contractual obligations of teachers and quality management			

1) Do you think that Bulgarian teachers of secondary schools have most of the above mentioned competences?

YES

NO

2) Do you believe that the current **pre-service education** prepares successfully the Bulgarian teachers in order to acquire the appropriate competences to teach in the knowledge based society of the 21st century?

YES

NO

3) Do you believe that the current **in-service training** prepares successfully the Bulgarian teachers in order to acquire the appropriate competences to teach in the knowledge based society of the 21st century?

YES

NO

4) In which of the three groups of teaching competencies: *teaching domain competencies*, *school domain competencies* or *professional domain competencies* you think Bulgarian teachers are lacking training?

-Teaching domain competencies

-School domain competencies

-Professional domain competencies

5) Which is, according to your opinion, the most important policy measure adopted by the Government that has helped or will help to be improved the teaching profession and why?

.....

Is there anything that it is not included in this questionnaire and you would like to add?

.....

Thank you very much for your time and collaboration!

ANNEX 21B. SAMPLE OF QUESTIONNAIRE IN BULGARIAN

Ирини Псифиду
с подкрепата на Световната банка
и правителството на Република
Гърция

Уважаеми респонденти,

Настоящото изследване е проведено от Ирини Псифиду, докторант, с подкрепата на Световната банка и правителството на Република Гърция. Тъй като разработването на национални стандарти за учителската професия е водещ приоритет в образователната политика в цял свят, изследването си поставя за цел да установи кои компетенции на упражняващите професията „учител в средния курс“ (5-12 клас) са най-важни според различните заинтересовани страни в българската образователна система.

Приложеният списък от компетенции се отнася до упражняващите професията „учител в средния курс“ (8-12 клас) и е разработен въз основа на международноприети изисквания за квалификацията на учителите, както и въз основа на стандартите за първоначална квалификация на учителите. Моля, отбележете срещу всяка компетенция доколко важна е тя според вас за развитието на набора от умения, необходими на един учител в 21-и век, в така нареченото „общество, основано на знанията“: няма значение, има косвено значение или има пряко значение (тоест е абсолютно необходима за един учител).

ВИЕ СТЕ:

Директор на училище	<input type="checkbox"/>
Учител	<input type="checkbox"/>
Представител на учителски синдикат	<input type="checkbox"/>
Началник на инспекторат	<input type="checkbox"/>
Инспектор/експерт	<input type="checkbox"/>
Университетски преподавател	<input type="checkbox"/>
Студент	<input type="checkbox"/>

ДАТА И МЯСТО:

ПОДПИС

Значимост на компетенциите в едно общество, основано на знанията

Педагогически компетенции	Няма значение	Има косвено значение	Има пряко значение
Квалифицираният учител:			
1. Организира учебния процес по преподавания предмет с оглед на спецификата на учениците и развитието на уменията, предвидени в учебната програма:			
Притежава уменията да представи и формулира преподавания материал така, че той да стане разбираем за останалите.			
Разбира какво прави усвояването на някои предмети лесно или трудно и си дава сметка за представите и предварителните нагласи, с които ученици на различна възраст, идващи от различна среда, пристъпват към изучаването на най-често преподаваните предмети и теми.			
Анализира погрешните представи на учениците по отношение на преподавания предмет.			
Планира последователността на часовете за преподаване на нов материал и проверка на знанията на учениците с оглед на логиката на учебното съдържание и на учебния процес.			
<ul style="list-style-type: none"> Познава учебното съдържание по преподавания предмет и връзката му с други предмети. 			
<ul style="list-style-type: none"> Осведомен е за различните гледни точки и за новите моменти в развитието на преподавания предмет. 			
<ul style="list-style-type: none"> Знае откъде може да получи информация за стратегии и ресурси на преподаване. 			
Определя ключовите моменти в преподавания предмет (понятия, постулати и методи), за да улесни пълноценното усвояване на знанията от учениците.			
Дава си сметка за представите, социалните различия (пол, етнически произход, социално-икономическо положение и културни особености), нуждите и интересите на учениците.			
Избира разнообразни и подходящи дидактически методи за развитието на уменията, предвидени в учебната програма.			
<ul style="list-style-type: none"> Може да аргументира направения избор и да обясни изборения метод. 			
Предвижда модели на обучение, които дават възможност усвоените умения да бъдат приложени в различен контекст.			
Осъзнава колко важно е да се познават предварителните познания, интересите и опита на учениците.			
<ul style="list-style-type: none"> Познава семейната и културната среда на учениците. 			
<ul style="list-style-type: none"> Може да опише различните начини, по които учениците му усвояват нови знания. 			
<ul style="list-style-type: none"> Прилага стратегии, за да се използват вече усвоените знания на учениците. 			
2. Ръководи учебния процес така, че да се усвои учебното съдържание, имайки предвид спецификата на учениците и необходимостта да се развият уменията, предвидени в учебната програма:			
Създава условия за включването на учениците в обсъждането на конкретни проблеми и важни теми или в осъществяването на учебни проекти, като взема под внимание техните когнитивни, психологически и социални особености.			
Ангажира вниманието на учениците, като подхожда към			

Педагогически компетенции	Няма значение	Има косвено значение	Има пряко значение
преподаването на нов материал и към работата в клас, използвайки помощни материали, които биха могли да подпомогнат прехода към усвояването на нови знания, и представяйки кратък план на урока.			
Представя учебното съдържание, подчертавайки връзката му с други области на познанието, обединени от определена водеща идея.			
<ul style="list-style-type: none"> Дава на учениците да разберат защо усвояването на преподавания материал е важно. 			
<ul style="list-style-type: none"> Създава учебна среда, която подтиква учениците да мислят и действат самостоятелно, дори и с риска да сгрешат. 			
<ul style="list-style-type: none"> Използва методи на преподаване, които допускат повече от един правилен отговор или подтикват учениците да обмислят различни възможности. 			
Осигурява на учениците необходимите ресурси за избрания модел на преподаване.			
Дава възможност на учениците да усвоят преподадения материал, като отделя по-голямата част от учебното време за учебни дейности.			
Задава въпроси, за да вовлече учениците в активна дискусия по дадена водеща идея.			
Подпомага учениците при избора, интерпретирането и разбирането на наличната информация.			
Насочва процеса на усвояване на знанията от учениците, като осъществява подходящи стратегии и стъпки, задава въпроси и дава информация за постигнатите резултати, за да улесни интеграцията и трансфера на знания.			
<ul style="list-style-type: none"> Осигурява вярна, обективна и навременна информация за постигнатите резултати от учениците. 			
<ul style="list-style-type: none"> Проверява доколко учениците разбират преподавания материал. 			
Дава на учениците достатъчно възможности да упражнят и да приложат придобитите знания и да получат информация за това как се справят и как биха могли да подобрят резултатите си.			
<ul style="list-style-type: none"> Дава възможност на всички ученици да усвоят новия материал 			
3. Оценява напредъка на учениците и степента на усвояване на предвидените компетенции по преподавания предмет:			
Умее да си служи с информация в учебния процес така, че преодолява проблемите и трудностите на учениците и да модифицира и адаптира методите на преподаване с оглед постигането на по-нататъшен напредък.			
<ul style="list-style-type: none"> Гъвкаво променя учебните дейности в съответствие с постигнатите резултати. 			
<ul style="list-style-type: none"> Обяснява как ще се промени начинът на преподаване според постигнатите резултати. 			
Следи напредъка на учениците както чрез периодични тестове и изпитване, така и чрез неформална оценка на участието в час и на работата по поставени задачи.			
Разработва свои или прилага готови средства за оценка на напредъка и степента на усвояване на предвидените знания и умения.			
<ul style="list-style-type: none"> Планира преподаването на нов материал и процедурите за оценка, взимайки предвид както естеството на съответния материал, така и степента му на усвояване. 			

Педагогически компетенции	Няма значение	Има косвено значение	Има пряко значение
Дава ясна и категорична информация на учениците и на техните родители за постигнатите резултати и за напредъка в усвояването на предвидените знания и умения.			
Партнира си с други учители при определяне на желания ритъм и етапите в образователния цикъл.			
<ul style="list-style-type: none"> Обменя идеи с колеги относно приложимостта на различни педагогически и дидактически методи. 			
4. Планира, организира и наблюдава груповата работа в клас, за да подпомогне образователния процес и социализацията на учениците:			
Определя и прилага ефективна система за организация на обичайните учебни дейности.			
<ul style="list-style-type: none"> Предоставя на учениците ясна и категорична информация за разпределението на учебното време. 			
Съобщава по недвусмислен начин на учениците какви са изискванията за добро поведение в училище и в обществото и взема мерки те да бъдат спазвани.			
Насърчава груповото и индивидуалното участие на учениците при установяване на нормите на поведение в класната стая.			
<ul style="list-style-type: none"> Насърчава участието на учениците, като приканва всички да дадат своето мнение при определяне на нормите на поведение или поне взема мерки всеки ученик да е запознат с тях. 			
Прилага стратегии за предотвратяване на прояви на неуместно поведение и се намесва ефективно, когато такива се появят.			
5. Адаптира преподаването към спецификата на учениците:			
Разработва учебни задачи, пригодени към възможностите и особеностите на учениците.			
Предвижда модели на обучение, които дават възможност усвоените умения да бъдат приложени в различен контекст.			
Определя ритъма на работа според възможностите и особеностите на учениците.			
<ul style="list-style-type: none"> Определя образователни цели, които дават възможност за разгръщането на широк спектър от когнитивни процеси. 			
Сформира групи от ученици с различни дадености и характеристики за съвместна работа.			
Подпомага социалната интеграция на ученици с образователни и поведенчески затруднения.			
Търси настойчиво информация за нуждите на учениците.			
Участва в изготвянето и прилагането на адаптиран план за работа.			
6. Използва информационни и комуникационни технологии при подготовката и осъществяването на учебните дейности и работата в клас и при собственото си професионално развитие:			
Има обективно и добре обосновано отношение към предимствата и ограниченията на информационните и комуникационните технологии като средство за преподаване и усвояване на знания, приложими в реалния живот.			
Оценява педагогическия потенциал на информационните и комуникационните технологии.			
Ползва различни мултимедийни средства за подпомагане на комуникацията, ползва ефективно информационни и комуникационни технологии, за да издирва, тълкува и предава информация и да решава			

Педагогически компетенции	Няма значение	Има косвено значение	Има пряко значение
проблеми.			
Ползва ефективно информационни и комуникационни технологии, за да изгражда мрежи за обмен на опит и информация, свързани с преподавания предмет и педагогическата практика.			
Помага на учениците да ползват информационни и комуникационни технологии в своите учебни дейности, да оценяват тяхното приложение за такива цели и да анализират обективно информацията, получена чрез такива източници.			
7. Изразява се ясно и правилно, както устно, така и писмено, в различните ситуации, свързани с упражняването на учителската професия:			
Ползва подходящ език при общуването си с ученици, родители и колеги.			
<ul style="list-style-type: none"> • Представя ясно целите на всеки урок. 			
Спазва правилата на писмения език в документи, предназначени за ученици, родители или колеги.			
Умее да заема позиция, да отстоява идеите си и да дискутира последователно, ефективно, конструктивно и с уважение към останалите.			
Служи си с въпроси, за да подтикне учениците да разберат и осмислят преподавания материал, да открият връзката между основните идеи в него и да си дадат сметка за тяхното значение, да мислят критично и да ползват наученото при решаване на проблеми и взимане на решения и в други житейски ситуации.			
Предава идеи убедено, служейки си с точен речник и правилен синтаксис; поправя грешките на учениците в устната и писмената реч, като се стреми непрекъснато да подобрява техния изказ.			
Компетенции, свързани с работата в училище	Няма значение	Има косвено значение	Има пряко значение
Квалифицираният учител:			
1. Работи в сътрудничество с училищния персонал, с родителите и с други заинтересовани страни с оглед постигането на образователните цели, които училището си е поставило:			
Работи съвместно с останалия училищен персонал при определяне на целите и при подготовката и осъществяването на проекти, свързани с предоставянето на образователни услуги.			
Насърчава участието на родителите и осигуряването на необходимата им информация.			
Насърчава участието на учениците в управлението на училището и неговите дейности и проекти.			
2. Работи съвместно с други членове на преподавателския екип при развитието и оценката на уменията, предвидени в учебната програма, като отчита спецификата на учениците:			
Знае в кои случаи разработването и прилагането на модели на обучение и оценката на усвоените знания и умения трябва да се осъществява в сътрудничество с други членове на преподавателския екип.			
Работи за постигането на необходимия консенсус между членовете на преподавателския екип.			
Професионални компетенции	Няма	Има	Има

Педагогически компетенции	Няма значение	Има косвено значение	Има пряко значение
	значение	косвено значение	пряко значение
Квалифицираният учител:			
1. Действа като критически мислещ професионалист, интерпретирайки по подходящ начин учебното съдържание при изпълнение на своите задължения:			
Откроява най-важните въпроси и опорните точни (понятия, постулати и методи) в преподавания предмет, за да улесни пълноценното усвояване на знанията от учениците.			
Умее да се дистанцира творчески от преподавания предмет.			
<ul style="list-style-type: none"> Оценява собствената си практика и действа според резултатите от тази оценка. 			
Умее да обясни по адекватен начин степента, в която учениците са постигнали желаните образователни цели.			
Установява връзка между културната действителност, отразена в предвидената учебна програма, и културната среда на учениците.			
Превръща класната стая във форум за открит обмен на различни възгледи.			
Подхожда безпристрастно към собствения си произход и културни особености и осъзнава своята социална роля.			
Установява връзка между знанията, придобити по различните предмети.			
2. Участва в индивидуални или групови проекти за професионално развитие:			
Оценява собствените си компетенции и предприема мерки за тяхното развитие, ползвайки наличните ресурси.			
Обменя идеи с колеги относно приложимостта на различни педагогически и дидактически методи.			
Оценява работата си и прилага резултатите от тази оценка в практиката.			
Насърчава колегите си да участват в изследвания, подпомагащи усвояването на уменията, предвидени в учебната програма, и постигането на образователните цели на училището.			
3. Действа етично и отговорно при изпълнение на функциите си:			
Дава си сметка за ценностите, които зависят от неговата работа.			
<ul style="list-style-type: none"> Отдава усвояването на знания главно на фактори, свързани с учебния процес. Приема образователните трудности на учениците като предизвикателство, с което трябва да се справи. 			
Отнася се като педагог към негативните коментари на учениците.			
Насърчава демократично поведение в класната стая. Отделя на учениците необходимото внимание и подкрепа.			
<ul style="list-style-type: none"> Допуска различие в мненията и възгледите на учениците. 			
Поддържа високи очаквания: вярва, че учениците са способни да усвоят предвидените знания, и е убеден в собствените си способности да ги обучи успешно.			
Обяснява от гледна точка на обществения интерес взетите решения по отношение на обучението и образованието на учениците.			
Зачита конфиденциалните аспекти на професията.			
Избягва всяка форма на дискриминация от страна на ученици, родители и колеги.			
Ползва ефективно и с разбиране правната и нормативната рамка, засягаща учителската професия.			

Педагогически компетенции	Няма значение	Има косвено значение	Има пряко значение
<ul style="list-style-type: none"> Наясно е с националната политика по отношение на учебната програма и учебния план, с договорните задължения на учителя и със системата за осигуряване на качество. 			

-
- Смятате ли, че съществуващите национални стандарти за квалификацията на учителите в България, включват повечето от гореизброените компетенции?

ДА НЕ
- Смятате ли, че българските учители в средния курс притежават повечето от гореизброените компетенции?

ДА НЕ
- Смятате ли, че съществуващата система за **подготовка** на педагогически кадри дава възможност на българските учители да придобият необходимите компетенции, за да преподават успешно в основаното на знания общество на 21-ви век?

ДА НЕ
- Смятате ли, че съществуващата система за **последваща квалификация** на педагогически кадри дава възможност на българските учители да придобият необходимите компетенции, за да преподават успешно в основаното на знания общество на 21-ви век?

ДА НЕ
- Според Вас в коя от трите области: *педагогически компетенции, компетенции, свързани с работата в училище и професионални компетенции* българските учители се нуждаят от допълнително обучение?
 - Педагогически компетенции
 - Компетенции, свързани с работата в училище
 - Професионални компетенции
- Коя според Вас е най-важната мярка, предприета от правителството, която е помогнала или ще помогне за подобряване на работата на учителите и защо?
-
- Ако има нещо, невключено в настоящия въпросник, което смятате за важно и бихте искали да споделите, ще се радвам да получа Вашето мнение.
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Благодаря Ви много за отделеното време и за съдействието!

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ANNEX 22. STATISTICAL ANALYSIS OF COMPETENCES BY DOMAIN AND GROUP

Teaching Domain Competences	Mi	NGO	Unions	Teachers	Prof	Students	Experts
1. Designing teaching-learning situations for the subject-matter to be learned, and doing so in function of the students and of the development of competences included in the curriculum	2.70	2.67	2.91	2.74	2.78	2.47	2.83
2. Steering teaching-learning situations in order for the content to be learned, and doing so in function of the students and of the development of the competences included in the curriculum	2.73	2.74	2.95	2.82	2.84	2.72	2.74
3. Evaluating learning progress and the degree of acquisition of students' competences in the subject matter to be learned	2.63	2.69	2.87	2.69	2.79	2.42	2.74
4. Planning, organizing, and supervising the way the group-class works, in order to help students learning and socialization processes	2.60	2.64	2.83	2.89	2.65	2.65	2.93
5. Adopting teaching to student diversity	2.71	2.79	2.98	2.55	2.68	2.59	2.48
6. Integrating the technologies of information and communication into the preparation and development of teaching-learning activities, classroom management, and professional development	2.66	2.44	2.84	2.26	2.77	2.22	2.16
7. Communicating clearly and correctly, both oral and written, in the different contexts related with the teaching profession	2.91	3.00	3.00	2.96	2.91	2.78	2.96
School Domain Competences							
1. Co-operating with the school staff, with parents, and with the various social agents to achieve the school's educational targets	2.50	2.53	3.00	2.61	2.46	2.67	2.32
2. Working in co-operation with the other members of the teaching staff in tasks enabling the development and evaluation of the explicit competences of the training plan, and doing so in function of the students	2.47	2.80	2.80	2.58	2.69	2.31	2.34
Professional Domain Competences							
1. Acting critically as a professional, interpreting the objects of knowledge or culture in performing one's functions	2.70	2.87	2.85	2.45	2.71	2.71	2.24
2. Becoming involved in an individual and collective project of professional development	2.53	2.40	2.75	2.27	2.73	2.66	2.13
3. Acting ethically and responsibly in the performance of functions	2.72	2.81	2.92	2.79	2.72	2.60	2.79

Source: Author

ANNEX 23. DETAILED STATISTICAL ANALYSIS OF COMPETENCES BY GROUP

201 respondents were asked to rate the “direct” or “indirect” degree of importance (scale of 1 = no importance; 2= indirectly importance; 3 = directly importance) that developing each competency would have for secondary level teaching, and for organizing teacher education activities accordingly.

Competences with a mean of 2.75 or higher are considered “directly” important and those with a mean between 2.74 and 1.75 as “indirectly” important.

	Teaching Domain Competences	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
	1, Designing teaching-learning situations for the subject-matter to be learned, and doing so in function of the students and of the development of competences included in the curriculum								
1	Mastering ways of representing and formulating the subject matter with the specific purpose of making it comprehensible to others	3.00	3.00	3.00	2.99	2.92	2.67	3.00	2.94
2	Understanding of what makes the learning of specific topics easy or difficult; and the conceptions and preconceptions that students of different ages and backgrounds bring with them to the learning of the most-frequently taught topics and issues.	2.78	3.00	3.00	2.91	3.00	2.46	2.91	2.86
3	Analyzing students’ misconceptions concerning the subject matter	2.50	2.00	2.80	2.63	2.69	2.42	2.78	2.55
4	Planning sequences of teaching and evaluation bearing in mind the logic of the content and of the learning process	2.80	2.50	3.00	2.94	2.92	2.54	3.00	2.81
5	Knowing the contents of the subject matter and its relation to other subjects	3.00	2.80	3.00	2.99	3.00	2.58	2.97	2.91
6	Knowing about different perspectives and developments in subject matter	2.80	2.80	3.00	2.97	2.92	2.50	2.94	2.85
7	Knowing of sources that provide information on teaching strategies and resources	2.70	2.60	2.80	2.61	2.77	2.33	2.78	2.66

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8	Identifying key elements of the subject matter (concepts, postulates and methods) in order to facilitate meaningful learning for students	2.90	2.80	3.00	2.96	2.92	2.75	2.97	2.90
9	Bearing in mind representations, social differences (sex, ethnic origin, socio-economic, and cultural), needs and special interests of the students	2.70	2.80	2.60	2.53	2.62	2.25	2.72	2.60
10	Choosing varied and appropriate didactic approaches when developing the competencies included in the curriculum	2.90	2.75	3.00	2.68	2.77	2.38	2.68	2.74
11	Explaining why certain teaching approaches were selected and is able to describe them	2.50	2.40	3.00	2.90	2.77	2.58	2.94	2.73
12	Foreseeing situations of learning that enable integration of competencies in varied contexts.	2.67	2.60	3.00	2.43	2.69	2.75	2.66	2.69
13	Recognizing the importance for learning of student prior knowledge, interests and experiences	2.56	3.00	2.80	2.47	2.85	2.33	2.61	2.66
14	Knowing about family and cultural background of students	2.40	2.20	2.80	2.32	2.38	2.08	2.56	2.39
15	Being able to describe the different ways of learning of their students	2.11	2.40	2.80	2.71	2.46	2.08	2.84	2.49
16	Uses strategies to put into action student prior knowledge	2.90	3.00	3.00	2.82	2.77	2.78	2.94	2.89
	2. Steering teaching-learning situations in order for the content to be learned, and doing so in function of the students and of the development of the competences included in the curriculum	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
17	Creating the conditions for students to become involved in situations-problems and in significant topics or projects, bearing in mind their cognitive, affective, and social characteristics	2.80	2.80	3.00	2.95	2.92	2.63	2.97	2.87
18	Establishing a learning orientation by starting lessons and activities with advance organizers or previews	2.90	2.60	3.00	2.88	2.62	2.75	2.94	2.81
19	Presenting the subject matter in networks of knowledge structured around powerful ideas	2.56	2.00	3.00	2.60	2.85	2.54	0.28	2.26

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20	Making it obvious that learning of subject matter is essential	2.40	2.80	2.80	2.95	2.85	2.88	2.97	2.81
21	Establishing a learning environment that invites students to think and act autonomously, even at the risk of error	2.80	3.00	3.00	2.97	2.92	2.83	2.97	2.93
22	Using teaching approaches that allow for more than one response or that invite thinking about different possibilities	2.70	3.00	3.00	2.70	3.00	2.75	2.81	2.85
23	Making available to students the resources necessary in the learning situations proposed	2.40	2.40	2.60	2.30	2.83	2.58	2.53	2.52
24	Giving students opportunity to learn, dedicating most of the available time to curriculum activities	2.70	2.60	3.00	2.80	2.46	2.58	2.94	2.73
25	Questioning to engage students in sustained discourse structured around powerful ideas	3.00	2.80	3.00	2.96	3.00	2.79	2.97	2.93
26	Guiding students in selecting, interpreting, and understanding the information available	2.90	2.60	3.00	2.63	2.77	2.75	2.75	2.77
27	Shaping students' learning by means of frequent and pertinent strategies, steps, questions, and feedback, so as to help the integration and transfer of learning	2.70	2.67	2.80	2.88	2.77	2.67	2.16	2.66
28	Providing correct, substantive and timely feedback to students	2.67	3.00	3.00	2.96	2.85	2.67	2.94	2.87
29	Adequate monitoring of student understanding	2.90	3.00	3.00	2.99	2.92	2.88	3.00	2.96
30	Giving the students sufficient opportunities to practice and apply what they are learning and to receive improvement-oriented feedback	2.89	3.00	3.00	2.84	2.85	2.79	2.00	2.77
31	Providing all students with opportunities to learn	2.70	2.80	3.00	2.92	2.92	2.67	2.94	2.85
	3. Evaluating learning progress and the degree of acquisition of students' competences in the subject matter to be learned:	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
32	In a learning situation, managing information in order to overcome student's problems and difficulties, and to modify and adapt teaching to sustain students' progress	2.70	2.50	2.80	2.84	2.85	2.58	2.91	2.74

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33	Flexibly altering learning activities according to feedback received	2.80	2.60	3.00	2.90	3.00	2.71	3.00	2.86
34	Explaining how teaching will be changed according to feedback received	2.10	2.60	3.00	2.77	2.69	2.00	2.94	2.59
35	Monitoring students' progress using both formal tests and performance evaluations and informal assessments of students' contributions to lessons and work on assignments	2.80	3.00	3.00	2.92	2.92	2.58	3.00	2.89
36	Constructing or employing instruments to enable evaluation of progress and acquisition of competences and skills	2.90	3.00	3.00	2.46	3.00	2.33	2.48	2.74
37	Planning learning sequences and assessment procedures taking into account both subject matter and learning processes	2.70	2.80	2.80	2.83	2.92	2.63	2.97	2.81
38	Communicating to students and parents, clearly and explicitly, the results achieved and the feedback concerning progress in learning and acquisition of competence	2.70	2.60	3.00	2.79	2.77	2.54	2.69	2.73
39	Co-operating with the teaching staff to determine the desirable rhythm and stages of progress in the training cycle	2.50	2.50	2.60	2.32	2.54	2.17	2.28	2.42
40	Exchanging ideas with colleagues regarding the appropriateness of the available pedagogical and didactic options	2.50	2.60	2.60	2.38	2.46	2.25	2.38	2.45
	4. Planning, organizing, and supervising the way the group-class works, in order to help students learning and socialization processes:	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
41	Defining and applying an effective working system for normal class activities	2.60	2.75	3.00	2.87	2.62	2.67	2.97	2.78
42	Providing students with explicit information on how lesson time will be distributed	2.20	2.50	2.60	2.78	2.31	2.67	2.91	2.57
43	Communicating clearly to students the requirements of correct school and social behavior ensuring that they adopt them	2.60	2.40	2.60	2.95	2.62	2.67	2.90	2.68
44	Fostering students' participation – as a group and as individuals – in establishing the norms to work and live together in the classroom	2.89	3.00	3.00	2.95	2.85	2.58	2.94	2.89

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45	Fostering student participation by having everyone participate in the generation of behavioral norms, or at least insuring they are known by all	2.70	3.00	3.00	2.89	2.77	2.58	2.97	2.84
46	Adopting strategies to prevent incorrect behavior cropping up, and intervening effectively when it does	2.60	2.20	2.80	2.91	2.77	2.71	2.88	2.69
	5. Adopting teaching to student diversity	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
47	Designing learning tasks adapted to students' possibilities and characteristics	2.90	2.80	3.00	2.89	3.00	2.73	2.72	2.86
48	Foreseeing learning situations that allow for an integration of competences in different contexts	2.80	2.75	3.00	2.51	2.92	2.83	2.53	2.76
49	Organizing different learning rhythms adapted to students' possibilities and characteristics	3.00	3.00	3.00	2.88	2.92	2.61	2.71	2.87
50	Setting learning objectives that allow for a wide spectrum of cognitive processes	2.70	2.80	3.00	2.88	2.69	2.50	2.69	2.75
51	Organizing heterogeneous groups for students to work together	2.70	2.80	3.00	2.28	2.31	2.71	2.19	2.57
52	Helping the social integration of students with learning or behavioral difficulties	2.70	2.60	2.80	2.32	2.54	2.83	2.34	2.59
53	Seeking pertinent information regarding students' needs	2.30	2.60	3.00	2.32	2.62	2.17	2.29	2.47
54	Participating in the preparation and implementation of a plan of adapted performance	2.60	3.00	3.00	2.32	2.46	2.30	2.34	2.58
	6. Integrating the technologies of information and communication into the preparation and development of teaching-learning activities, classroom management, and professional development.	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
55	Adopting a critical and well-founded attitude to the advantages and limitation of ICT as medium for teaching and learning for society	2.70	2.60	2.60	2.29	2.92	2.25	2.06	2.49
56	Evaluating the pedagogical potential of ICT	2.60	2.40	2.60	2.26	2.92	2.29	2.06	2.45

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57	Using a variety of multimedia tools for communication, using the ICT effectively to investigate, interpret, and communicate information, and to resolve problems	2.70	2.40	3.00	2.32	2.69	2.25	2.03	2.49
58	Using the ICT effectively to set up networks of exchange related with the subject taught and its pedagogical practice	2.60	2.60	3.00	2.07	2.46	2.04	2.25	2.43
59	Helping students use the ICT in their learning activities, to evaluate such use, and to analyze critically the data gathered by these networks	2.70	2.20	3.00	2.35	2.85	2.25	2.38	2.53
	7. Communicating clearly and correctly, both oral and written, in the different contexts related with the teaching profession:	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
60	Using the appropriate oral language when addressing students, parents, or colleagues	2.89	3.00	3.00	2.98	2.92	2.92	2.97	2.95
61	Presenting clearly the purposes of each lesson	2.90	3.00	3.00	2.96	2.77	2.67	3.00	2.90
62	Respecting the rules of written language in documents aimed at students, parents and colleagues	2.90	3.00	3.00	2.94	2.85	2.71	2.94	2.90
63	Knowing how to take a position, and maintain one's ideas and discuss coherently, effectively, constructively and respectfully	2.90	3.00	3.00	2.94	3.00	2.87	2.94	2.95
64	Using questions to stimulate students to process and reflect on content, recognize relationships among and implications of its key ideas, think critically about it, and use it in problem solving, decision making, and other higher-order applications	2.90	3.00	3.00	2.99	3.00	2.79	2.97	2.95
65	Communicating ideas rigorously, using precise vocabulary and correct syntax; correcting errors made by students in their oral and written work; constantly, seeking to improve oral and written experience	3.00	3.00	3.00	2.96	2.92	2.75	2.94	2.94
	School Domain Competences	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
	1. Co-operating with the school staff, with parents, and with the various social agents to achieve the school's educational targets:								

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66	Co-operating with the other members of the school staff in defining targets, and in the preparation and putting into effect of projects on educational services	2.60	2.60	3.00	2.61	2.54	2.71	2.34	2.63
67	Promoting participation and the flow of relevant information to parents	2.40	2.40	3.00	2.59	2.38	2.50	2.31	2.51
68	Encouraging student participation in the management of the school and its activities and projects	2.50	2.60	3.00	2.64	2.46	2.79	2.31	2.62
	2. Working in co-operation with the other members of the teaching staff in tasks enabling the development and evaluation of the explicit competences of the training plan, and doing so in function of the students:	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
69	Knowing which are the situations requiring collaboration with other members of the pedagogical team for the design and adaptation of teaching-learning situations and the evaluation of learning	2.60	2.80	2.80	2.60	2.77	2.29	2.34	2.60
70	Working to achieve the required consensus among the members of the teaching staff	2.33	2.80	2.80	2.57	2.62	2.33	2.34	2.54
	Professional Domain Competences	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
	1. Acting critically as a professional, interpreting the objects of knowledge or culture in performing one's functions:								
71	Identifying the core issues and the axes (concepts, postulates, and methods) of knowledge in the subject in order to facilitate students' meaningful learning	3.00	3.00	3.00	2.71	2.92	2.96	2.38	2.85
72	Critically distancing oneself from the subject taught	2.57	3.00	2.60	2.28	2.50	2.74	2.06	2.54
73	Reflecting about practice and acting upon the results of such reflection	2.60	3.00	2.80	2.31	2.77	2.46	2.06	2.57
74	Explaining adequately the degree to which students achieved desired learning targets	2.70	2.80	3.00	2.86	2.85	2.58	2.93	2.82
75	Establishing relationships between the cultural background embedded in the prescribed curriculum and that of the students	2.50	2.80	2.60	2.28	2.62	2.58	2.03	2.49

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76	Making the class a place open to multiple viewpoints	2.90	2.80	3.00	2.33	2.69	2.67	2.06	2.64
77	Taking a critical look at one's own origins and cultural practices, and at one's social role	2.60	2.80	2.80	2.59	2.75	2.75	2.34	2.66
78	Establishing relationships among different fields of the subject matter knowledge.	2.70	2.75	3.00	2.28	2.62	2.92	2.03	2.61
	2. Becoming involved in an individual and collective project of professional development:	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
79	Evaluating one's own competences and adopting the means to develop them using available resources	2.70	2.40	2.80	2.27	3.00	2.71	2.06	2.56
80	Exchanging ideas with colleagues about the suitability of pedagogical and didactic options	2.40	2.40	2.80	2.19	2.62	2.58	2.03	2.43
81	Reflecting on one's practice, and putting the results into practice	2.70	2.60	2.80	2.54	2.85	2.74	2.42	2.66
82	Encouraging colleagues to participate in research aimed at the acquisition of competences set out in the training plan and educational targets of the school	2.30	2.20	2.60	2.11	2.46	2.63	2.00	2.33
	3. Acting ethically and responsibly in the performance of functions:	Mi	NGO	Unions	Teachers	Prof	Students	Experts	Total
83	Being aware of the values at stake in one's performance	2.88	3.00	3.00	2.81	2.77	2.71	3.00	2.88
84	Attributing learning mainly to factors related to the teaching-learning process	2.22	2.60	3.00	2.47	2.46	2.68	2.56	2.57
85	Interpreting student learning difficulties as a challenge to be met	2.70	3.00	2.80	3.19	2.92	2.83	2.88	2.90
86	Dealing pedagogically with student negative comments	2.80	2.80	3.00	2.94	2.69	2.75	2.90	2.84
87	Encouraging democratic conduct in class. Giving students due attention and support	3.00	3.00	3.00	2.95	2.77	2.71	2.84	2.90
88	Allowing for differences in postures and points of view among students	3.00	3.00	3.00	2.91	2.77	2.54	2.78	2.86

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89	Keeping high expectations: believing that the students are capable of learning and that they are capable of and responsible for teaching them successfully	2.80	2.80	2.80	2.62	2.85	2.46	2.75	2.73
90	Explaining, in function of the public interest, the decisions taken concerning students' learning and education	2.30	2.60	2.60	2.50	2.31	2.50	2.59	2.49
91	Respecting the confidential aspects of the profession	2.70	2.80	3.00	2.86	2.77	2.79	2.84	2.82
92	Avoiding all forms of discrimination by students, parents, and colleagues	2.90	2.80	3.00	2.95	2.92	2.83	2.94	2.91
93	Making judicious use of the legal and authorized framework governing the profession	2.70	2.75	3.00	2.93	2.77	2.21	2.94	2.76
94	Knowing about national educational policies related to the curriculum, contractual obligations of teachers and quality management	2.60	2.60	2.80	2.63	2.69	2.13	2.47	2.56

Source: Author

Note:

- Mi: Ministry officials from the Directorates of General Education policy, Teachers' training, Textbook approval selection, National Assessment Unit
- NGO: Experts from Paideia foundation and Special Education needs
- Unions: Teachers' Union of Sofia
- Teachers: Teachers from 46 different comprehensive and elite schools from all regions in Bulgaria.
- Prof: University Professors of the University of Sofia from the department of: Bulgarian language and literature, Sociology, Philosophy, Journalism, Foreign languages (French language), Mathematics.
- Students: Students from the University of Sofia.
- Experts: Inspectors from 26 regional inspectorates across Bulgaria

ANNEX 24. NATIONAL PROGRAM FOR THE DEVELOPMENT OF SCHOOL EDUCATION AND PRE-SCHOOL EDUCATION AND PREPARATION (2006-2015)

SCHEDULE OF ACTIVITIES

Objective	Activities	2006	2007	2008	2009	
1. Development of the evaluation framework	Development of a general evaluation framework	December	June			
	Training of the Bulgarian evaluation experts: psychometrics, testologists		Current	Current	Current	
	Attracting external evaluation consultants	December	June			
	Development of information packages for teachers, students and parents	Current	Current	Current	Current	
2. Building up EQCEC capacity						
External evaluation at the end of IV grade	Development of a concept on the format and the content of the examination	November				
	Training of authors of test puzzles	Current				
	Development of a pool/bank of sample puzzles	Current	Current	Current	Current	
	Approbations, analysis	Current	Current	Current	Current	
	Training of examiners and evaluators		January – April	January – April	January – April	
	Devising tests for the purpose of evaluation		March - April	March - April	March – April	
	Performing the evaluation		May	May	May	
	Analysis of the results		June	June	June	
	Admission examination after the VII grade	Development of a concept on the examination format and content	May – September for the 2007 Examination	January – June for the 2009 Examination		
		Training of authors of test puzzles	Current	Current	Current	Current
Development of a pool/bank of sample puzzles		Current	Current	Current	Current	

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	Approbations, analysis	May, October	January – April, October	January – April, October	January – April, October
	Training of examiners and evaluators for the exams	November	January – April	January – April	January – April
	Devising several sample tests		February – April	February – April	February – April
	Examination		June	June	June
State matriculation/school-leaving exams (SME)	Development of a concept on the format	November			
	Sample versions	December			
	Training of authors of test puzzles	Current			
	Development of a pool/bank of sample puzzles	Current			
	Approbations, analysis		April, October	January – March, October	January – March, October
	Training of examiners and evaluators for the exams		January – April	January – April	January – April
	Devising several sample tests				
	Performing an examination		April (Pilot, testing)	April (Pilot testing)	May (Actual)
PISA 2006	Substantive study		February-March		
	Analysis and results		December		
PISA 2009	Pilot research		April – December	February – March	
	Actual Research			April – December	February – March
	Analysis and results				December
Introduction of test measurement at the entrance and the exit by subjects	Support of a pool of puzzles, devising of tests, approbations, analysis	Current	Current	Current	Current
3. DEVELOPMENT OF A STANDARD EXTERNAL EVALUATION SYSTEM	Study best practices in the performance of national standard examinations on such a scale	September – December	January – March		

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	Development of procedures on the organization of the different types of external evaluation		January – March		
	Development of a database integrated information system		January – December		
	Establishment of regional examination centers		April – December		
	Purchase of equipment (optical readers, computers), as well as specialized software for data processing		January – April		
	Training of the examination center staff		April – December		
	Testing the information system		December	January – March	
	Testing the organization on holding the exams, as well as the external evaluation	Current	Current	Current	

Source: MES, 2006. Official Document. Bulgaria