

EDUCATION REFORM IN BULGARIA

A study in failure

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Introduction

Recent experience, as well as the increasingly voluminous literature on “delayed” reform, tell researchers and reformers something relatively simple, yet disturbing. Many countries have started or will be starting reforms; quite a number of these countries have failed, are failing or will fail in this attempt. Some will fail roundly. Others will fail partially and will move along with a heavy limp, never certain when system failure may occur.

Usually, the literature deals with issues of economic reform¹ and finds the culprit in politics. This makes research applicable to other fields, where politics is paramount and particularly, “second generation” reforms, such as education, which require restructuring of institutions – who, of course, resist it.

Even partial failures here have significant consequences.

The awareness that something was terribly wrong with Bulgarian education came only after 2000, after a decade of self-congratulatory myths and in the face of consequences, which could not be easily explained away.

First, a mismatch between *skills* attained and skills needed became obvious. Employer organisations complained that they were increasingly unable to find Bulgarian nationals to fill mid-level managerial positions, and were forced to import staff from abroad at significant cost. A representative study, carried out by Alpha Research, a major polling agency, in 2004 revealed that only 38 per cent of employers in Bulgaria thought that the education system provided the young with the skills they were looking for.²

Second, *preformance* levels dropped. A series of international studies revealed, by 2003 that, while Bulgarians performed well at the level of primary education (1-4th grade), after that figures were little short of disastrous. By the time they were 15 years old, Bulgarians were (according to an international OECD study, covering 41 countries) in 33rd place in literacy and at 33rd place in mathematical skills, ahead only of countries such as Indonesia, Albania and Peru.³

A UNESCO study of 160 countries, published in the press in November 2004⁴, revealed that, in terms of education levels, Bulgaria was leaving the developed world. The study grouped countries into three categories, according to the performance of school students. Bulgaria was out of the leading group (Europe and the USA), and had landed in the group containing countries from Latin America and the Middle East.

Third came the realisation that the education system was no longer capable of serving the goal of *inclusiveness*. On top of the earlier realisation that there were anything up to 100,000 children (more than one-tenth of the school population) outside the schools at any given time⁵ was coming the awareness that whole ethnic groups were being excluded. At the end of 2003, a leading NGO, the International Centre for Minority and Inter-Cultural Studies published the findings of the biggest-ever research on minority and exclusion. “In terms of education”, wrote the authors, “there are two separate Bulgarias ... Illiterate are 18 per cent of all adult Roma, only 12 per cent have secondary education and 0.7 per cent have completed higher education”. The research found that the drop-out rate was also minority-specific. In the villages, drop-out rates for Muslim Roma were more than 25 per cent, compared to about 2 per cent for ethnic Bulgarians.⁶

Fourth came the realisation of Universities, which, unlike the schools, had partially modernised, that the intake quality was degrading rapidly.

Finally, *fifth*, came the political consequence. In the June 2005 elections for the Bulgarian National Assembly, a hastily put together quasi-fascist movement, Ataka, broke through the 4-per cent barrier, forming the fourth largest (out of seven) parliamentary group in a country where up to one-third of the population come from minority backgrounds, primarily Muslim. A significant proportion of its vote, it transpired, came from school teachers.

A leading pundit, Dr Haralan Alexandrov, commented this in the electronic newspaper “Vsekiden”⁷: “... the education system is structured, so as to produce disorientated and dependent individuals, who lose out in a globalising world. ... The great drama of this society is that the key normative systems have been created to produce obedient subjects for a totalitarian system, while in the globalised world such people are doomed to failure.”

The failure of education reform had become a development hindrance and a security risk. In this sense, the “Bulgarian case” has a wider relevance; and its evaluation goes beyond routine academic curiosity.

Why do reforms fail? Until recently, researchers and reformers tended to agree with previous World Bank orthodoxy that failure of political commitment was the culprit. There is, however, an emerging consensus⁸ that reform failure is a more complicated phenomenon. It is seen as the result not only of weak political will, but also of the sabotage of institutions of government, which see themselves as players in a power game and refuse to participate in the diminution of power that reform inevitably entails.

It is not accidental that, in Bulgaria, the two most conspicuous failures of reform since the 1990s have been: reform of the state administration; and education reform. In both cases, administrative structures successfully sabotage reform ideas coming from the political level; and in both cases the intention is more or less the same: *first*, to avoid accountability and the creation of systems, under which performance can be evaluated by reference to results; *second*, to preserve a corporate culture based on the control over resources and escape the imposition of cultures of service, service-provision, partnership and transparency. Such sabotage is particularly easy to conduct when the *necessity* and the *legitimacy* of the reform have not been widely believed⁹ – and therefore stakeholders, agents and addressees of reform are left out of the process.

This analysis, part of a much larger text, is based on primary sources, opinion polls, in-depth interviews and group discussions with representatives of key stakeholders (school Heads, teachers, Ministry officials, ex-Ministers and Deputy-Ministers). Like other researchers, we had great difficulty in getting documents from the Ministry of Education (MES) and had to do with what is available on web-sites and the media. The intention has been to construct a picture of the problems, a picture of the players and their interests, a model of reform failures and to thereafter sketch out avenues for progress that look reasonably easy to implement and evaluate.

The focus is on *school-level* education only, and above all at the comprehensive schools, leaving specialised schools to the periphery. The problem dealt with is the failure reform, rather than – an evaluation of the various deficiencies in the system.

There is also a rather longer historical perspective than is usually the case in such studies. The intention behind this is to find and clarify the roots of various forms of resistance to education reform, because these roots still feed sabotage in the 21st century.

The aims of education, or: What Is Education For?

The circumstances and aims obtaining at the moment of inception can stamp systems for generations to come. Reformers should be aware of this before starting out – because reform, even of the most drastic kind, is not an engineering, but a gardening exercise. Reformers do not clear the ground for new foundations with bulldozers; but rather must re-profile and re-compose elements of an already existing reality, adding new elements carefully and with what architects call “a sense of place”. Otherwise it will all wilt; and the status quo ante (but in a degenerated version) will prevail.

Mass education in England, for example, was constructed to serve the aim, formulated by Lord Macaulay as “we must educate our masters”, i.e. the working people, prior to giving them the vote. This aim structures the lasting particularities of English schools, such as the stress placed on group ethic, the emphasis on reasoned debate, the liberal arts and so forth. In Germany and Russia, the overriding aim – Germany’s under Bismarck, Russia’s under Stalin – was to catch up militarily with the more advanced countries. Hence, mass education was constructed so as to produce the engineers and organisers, needed for rapid re-armament, industrialization and war.

The aims built into Bulgarian education during the 19th century were: a/ *nation-building*, based on a heroic version of history; b/ *upward mobility*, based on accessibility, inclusiveness and a comprehensive curriculum.

When echoes of the Enlightenment began reaching the Bulgarian part of the Ottoman Empire, the period of “National Revival” began, characterised by the rejection of existing forms of government and of Medieval thought. In this case, however, enlightened thinking did not involve a break with one’s own past, nor a revision of one’s own thoughts. Hostility to inherited forms of government took the shape of opposition to the foreign occupier, the Ottoman Empire. Suspicion of Medieval knowledge took the shape of opposition to the Greek Orthodox establishment which, during the Ottoman period, had taken on the role of spiritual power in the Christian lands, complementing the secular power of the Sultan. One’s own history remained beyond criticism. Indeed, it was to become the foundation of a new, enlightened and post-Ottoman nation-state.

In terms of politics, the outcome of this was a political struggle to overthrow the Sultan, which produced Independence by 1878-9. In terms of education, the outcome was the demand for secular

education in geography, history, arithmetic and grammar, serving the over-riding aim of forming the future citizens of the modern Bulgarian nation state.

Education was not about skills, but about political liberation and was therefore a huge national movement, conducted with tremendous enthusiasm. By 1877, there were schools in 1,504 Bulgarian towns and villages, a considerable achievement for a system based on voluntary effort and community funding outside the state. Standards were enforced by elected School Boards, while curriculum was set by an annual Teachers' Convention.

Once the system was up and running, however, its political aims were not enough to provide it with an efficient structure. A "model" of education system had to be chosen. The choice was more difficult than it seems, because it went to the very heart of the debate about national identity. Was Bulgaria to become like "the West", and therefore follow a "Western" model of schooling? Or was it to find its identity in "Slavdom" and therefore become like Russia? The pro-Russian choice came to be seen as a better bet politically. Russia, rather than the Western Powers, was likely to pressure Turkey (as it was to do in the Russo-Turkish war of 1877-78) to let Bulgaria go independent.

This decision to base education on the Russian model was to have significant consequences, reaching into the 21st century. A comprehensive piece of research, published by the Bulgarian "Gallup International" group in 2000, found that the education system still functioned above all as a power pyramid, with the student at its lowest rung: "Bulgarian schools follow the ideology of the Prusso-Russian system. A strict hierarchy between teacher and pupil;... punishments, including physical... In other words – a system with clear hierarchical opposition between power-holders and addressees of power, aimed at engorging the child with knowledge and with the skills of subjection to power and authority."¹⁰

The first codification of the education system, by a decree of the occupying Russian army in August 1878, structured a system of three levels: elementary (three years); "middle" (two years); "major" (four years). Since, under the terms of the Armistice with Turkey, Bulgaria had got all territories it considered its own, the political aims of education were dropped. Reading, writing and religious knowledge were to be the key aims of schooling.

By the time of the first Education Act (1909), this was no longer the case. The Great Powers, gathered at the Congress of Berlin, had reduced Bulgaria to one-third its size under the Armistice. Bulgarians were convinced that they had been unfairly treated. The agenda of national liberation was revived: henceforth the nation was to prepare to liberate its territories, left inside the Ottoman state, by force. Northern Bulgaria (autonomous) and northern Thrace (an Ottoman province with special status), lying on both sides of the Balkan mountains, had been re-united in 1885, against Great Power opposition. The annexation of southern Thrace and Macedonia was at the heart of the national ideology until the end of the Second World War and everything – particularly education – was subjected to this aim.

For this reason, the task of education as "preparing patriots" made a triumphant reappearance in the 1909 Act. The other task, which governments built into the school system, arose out of the "flat" structure of Bulgarian society and it was this: to provide an easily and universally accessible route for upward mobility. Every peasant child was to have the equal opportunity to attain higher social status by going through the school system.

More specifically, the new state needed to construct its bureaucracy, and fast, out of a society of peasants, herders and artisans. With this in mind, the system reiterated decisively its preference for comprehensive schooling. Education was not to be about skills, but about equal opportunities, through the teaching of the same curriculum under equal conditions. This it had the full backing of the public, which saw profiling of school students as discriminatory.

Once the system set, it enjoyed uncritical popular support. Any attempt to change it was immediately seen as endangering either the "national identity" aim, or the "upward mobility" aim, or both. Even following the communist takeover of 1944, the aims of education were re-worded, rather than transformed. The 1948 Education Act set the aim of school education as "the formation of citizens of a socialist state" and described education as "part of the cadres-formation policy of the socialist state." The mobility aim was strengthened, as the socialist state developed a voracious appetite for new functionaries untainted by association with the old regime.

Education, in short, was never seen as a "service", nor – as a source of skills for individual prosperity. It was, rather, an instrument of national survival in a world of predators (the Great Powers), and a vehicle for upward mobility, intending to turn a community of peasants into a nation state. In a Rousseau-like twist of logic, education was to do with the nation, rather than with mere students.

This inheritance has a message. Anyone, who wants to reform education must be able to explain that such reform re-affirms in new ways, rather than damages, the ideals of nation-building on the one hand, and of equal and fair access to education as a vehicle for upward mobility, on the other. If

this is not done, public support will not be recruited. Reform will hang in the air as a top-down exercise in social engineering, and will fail.

The subject of education, or: Who Is the Educator?

The network of secular schools, providing four-year comprehensive education for all, which appeared in the Bulgarian part of the Ottoman Empire through the 19th century, were entirely community-based. In current parlance, we would say that schools then were locally-funded NGOs, voluntarily adhering to the education standards set by the annual Teachers' Conventions. After Independence, rigid centralisation set in. It could hardly be otherwise, given the state-building aims, which education served between 1879 and 1945.

The very first legislation, the 1885 Law on Public and Private Schools, preserved the School Board system, but took away Board powers to lay down the content of education. Under the 1909 Act, education content was set by the government and the methods of teaching were authoritarian and disciplinarian. Such policies were strongly supported by a society, which wanted to "re-unite" with Thrace and Macedonia, while moving up the social scale – both of which it saw as best served by a state-run system. Bulgarians were never to become comfortable with the idea of private schooling. It was seen as unjust (placing some individuals in a privileged position in the mobility race) and, being privately owned, could not be trusted to produce "patriots".

Under the 1948 Act, centralised control intensified in imitation of the Soviet Union. While municipalities continued, as they do to this day, to fund most schools, they lost all control over content and process. Heads of schools, teachers and inspectors became state appointees under the Ministry of Education. The handful of existing independent, private and charitable schools were shut down.

It was – and is – the Minister, who decides where to have schools, how many teachers are to work in them, with what facilities and equipment. But it is the municipalities, who have no voice in any of this, who foot the bill.

Once entangled with state power, the education establishment re-positioned itself as a player in the power game. By 1930, education was the third-biggest expenditure (after defence and servicing of the national debt) in the national budget. It was the biggest employer. Governments came to fear and respect the well-organised teaching profession, while political parties used teachers as their organisational backbone. It was not long before education became the arena of corruption and clientelism – something, which was to make it resilient to reform.

Knowledge and power fused early in Bulgarian society, and have remained so fused. Changing one is impossible without changing the other. Education reform, if attempted without reference to the larger context of power, will fail. Changing education means changing the state, because the state is the educator and is seen as legitimate in this role. Education reform means – system change.

What Is Education Reform For?

Education reformers usually justify their intentions by arguments to do with quality of service, skills, comparative national advantages in the marketplace and, increasingly, with the "knowledge-based economy". Such a "reform discourse", however, will fail to "connect" with either the public, or the education establishment in Bulgaria, because it addresses issues which have not been durably built into the education system. The survival of "the nation", rather than the marketability of skills is what education has been perceived to be about.

The survival of the education status quo, rather than the performance of school leavers in the marketplace, is inevitably the hidden agenda of the education establishment. As leading reformer, Dr Petya Kabakchieva, noted during the revival of the education debate in the spring of 2005¹¹: "The fundamental problem of Bulgarian education is that it is still seen as a social, rather than an educational activity. The entire system of management and financing of education is directed at preserving the system, with its over-abundance of teachers and buildings; and the price is poor, low-quality education."

Under such conditions, attempts at education reform are usually provoked by pressure from the outside; and are therefore easily packaged as a conspiracy of the Great Powers to undermine the Bulgarian nation state and / or take away the right of all Bulgarians to access education, on an equal basis, in order to move up in life.

This has been the case since the 1930s, when reform was imposed by the League of Nation's Financial Committee (FC), which had provided Bulgaria with two loans in 1926 and 1928 for post-war reconstruction. Built into the loans was a requirement for balanced budgets and structural reforms – much as the IMF and World Bank were to do in the 1990s. Demands for financial restructuring were centered on education. While the government signed up to this to get the money, for a decade it evaded any changes, hiding education expenditure from the FC in other parts of the budget. In this, the

government was supported by the public (which feared that reform would make education inaccessible) and by the education establishment, which feared the loss of jobs, resources and power.

Apart from embedding the system in Marxist-Leninist ideology and centralising it on the Soviet model, the communists also kept the system as it was. By the late 1950s, however, things became complicated as it dawned on them that the “cadres” needed for break-neck industrialisation were not available. In April 1959, a special session of the Party’s leadership concluded that the problem of school-level education was “the incorrect formulation of its main task – to prepare young people above all for entry into the Universities and into the administration apparatus... Education has no connection with productive work...”

The Party’s leadership declared the beginning of the greatest-ever attempt to reform the entire system in one fell swoop, stipulating a: “Fundamental re-structuring of the current secondary comprehensive school by creating a new type of secondary school, with a 12-year course of studies, which school to unify the positive aspects of comprehensive and professional schools on the basis of a wide polytechnic and production-related approach... The main aim of the new secondary school will be to prepare the students scientifically, technically, practically and psychologically for participation in material production.”¹²

What happened during the 1960’s was something different. The comprehensive schools imitated change and it was the technical (professional) schools, a 1950s import from Soviet Russia, which continued to produce narrowly profiled “cadres” for industrialisation. A completely different, entirely unplanned, profiling did appear, but – at the top end of the system. An elite-type of school appeared, growing out of urban schools teaching foreign languages. By the end of the 1960s these “language gymnasia”, taking in students still in the “middle” level of education (7th grade, or age 14) by entrance examinations, came to be seen as the fastest track for upward mobility.

This state of affairs ensured that, ten years after its initial declaration of reform, the Party leadership returned to the subject in 1969. The leaders noted that 96 per cent of school students, having completed the eight years of “middle” level of education, then went on into secondary education proper. This, the leaders decided, created chaos in the economy, because it was not clear which education level produced “managerial cadres”, and which level produced mere “cadres”.

What the Party concluded was that another reform was needed. It was decided to declare secondary education obligatory (until then, only “middle-level education” was so) and in this way subsume all education levels (elementary, middle and secondary) into a new type of school called Unitary Secondary Polytechnic School (USPS).

The remaining years to the regime’s collapse were spent in an unsuccessful attempt to create this type of school. What in fact happened was that the three-pronged system of school education, which had taken shape by 1969 – technical, general comprehensive, “language” gymnasia – remained in place, underpinned by the general public conviction that this was a system able to service the ambitious, while not abandoning the rest. Another decade later, in 1979, the Party’s General Secretary and Head of State, Todor Zhivkov, specifically declared this system as defective, because none of its three components provided youngsters with the “necessary work-related polytechnic potential and readiness to work”.¹³ A new reform was again declared, centered on a change in the structure and curricula of USPS. This reform, with an end-date 1993, set the following levels of knowledge to be attained: the first level (more or less equivalent to the old “elementary” level) was to provide children with “general knowledge”; the second (more or less equivalent to the old “middle”) level was to help children attain “a wide professional profile”, while the finishing level (secondary proper) was to provide students with “specialisation in a specific professional area”.

The idea was for the USPS to be able to provide “cadres” for all, without exception, professions and walks of life, from the production of sheet metal to the highest levels of administration and the arts.

Having managed to wait out previous attempts at reform, the education establishment did just that through the 1980s and the USPS reform was sporadic at best. The public was against the reform, because it saw the narrow specialisation at the end of school as discriminating – as taking away the equality of chances for post-school mobility. In this, they found the quiet support of the then Education Minister, Professor Ilcho Dimitrov. He was to explain his sabotage, in his memoirs, with reference to the traditional aims of Bulgarian education: “I was convinced that the school must retain its general comprehensive character... The top leaders did not realise that secondary education is not simply a factory producing specialists, but is rather the source of an educational minimum for citizens in a modern society – a minimum obligatory for all, whatever their professional realisation tomorrow.”¹⁴

At no time during the 20th century were the minimal conditions for education reform met, such as: resolute political commitment; public and stakeholder support; institutional reformability. For most of the 20th century “education reform” was seen as something alien and to be resisted. The public

defended what it saw as the only route for advancement for its offspring – the all-inclusive, accessible and comprehensive school system. As for the education establishment, having succeeded in scuppering reforms since the 1930s, it entered the 1990s with the confidence that it had the resources, skills and experience to oppose all change.

After communism: “Reform” or “Stability”?

Since the World Bank’s ground-breaking “World Development Report 1997”, theory and practice have abundantly illustrated that the key to reform success or failure is in *institutions*. Quite simply, inherited institutions were once constructed so as to maintain the very thing you now want to reform in the shape that you no longer want it. Before reforming the thing (service, activity), you need to reform the institution responsible for it – get it into the new shape required by the new reality you want to achieve. Otherwise you get into the situation described by Willy McCourt in his analysis of civil service reform in Swaziland: “In the words of a donor representative, ‘What people won’t say is that they’ll say yes, yes, but when it comes to actually implementing they will sense that they will not be the beneficiaries, because they are the beneficiaries of the present system.’”¹⁵

Given the heavily centralised and state-run education system in Bulgaria, reforming education requires a prior reform of the Ministry of Education (MES), its regional inspectorates, the schools and their environment, as well as changes in the structure of funding. This entails a dramatic re-distribution of power and resources, as well as fundamental changes in ways of doing things. Or, as the World Bank has concluded, re-hauling institutions is difficult, because it is a political exercise: “Strong interests may develop, for example, to maintain an inequitable and inefficient status quo, whereas those who lose out from this arrangement may be unable to exert effective pressure for change.”¹⁶

I. The mid-1990s: reform as treason

In the opening post-communist years, the general feeling was that, with the regime at an end, the main work of “transition” was done. The economy, administration and education were seen as basically sound, needing only some changes once Party rule stopped blocking their progress. The only major innovation in the 1991 Education Act was the intention to streamline the system – which was in chaotic shape after decades of start-stop reforms – by introducing 22 “government standards” in curriculum and teaching. Work on these “standards” was, however, not to begin before the closing years of the decade.

The very few documents on the education problematic, available to 1994-5 and using the term “reform”, do not differentiate between school education, higher education and scientific research. The three are seen as suffering from the same problem: too much inherited ideology and too little funding. A typical example is the “White Book on Bulgarian Education”, published by Sofia University in 1992. The basic problem was seen as the contradiction between the “quantitative scale” of education and science (i.e. the numbers of people employed) and their “miserly funding”. This was seen as the factor holding back education, for, as the authors of the “White Book” conclude, Bulgaria would be left behind because “the 20th century draws its might not from the quantity of machinery produced, but from the numbers of highly educated individuals...”¹⁷

Over 1992 and 1993, during the short life-time of the first democratic government, the MES introduced a new school curriculum, intending to overcome ideological deformations, but only in the teaching of history. The idea had three basic components. First came the inherited conviction that “history” was what formed current national identities – and, therefore, that the national awareness of today is the product of the teaching of a certain version of the past. Second was the consensus that, during communism, national history was falsified in order to legitimise the rule of the Party and its subservience to Moscow. Third, with an eye on the ethnic wars in neighbouring Yugoslavia, came the intention to clear up textbooks of terms and interpretations offensive to minorities.

The “reform” as it was called then, consisted of the re-writing several elements of history. The period 1944-89 was dropped as too controversial, pending political agreement on the interpretation of the “socialist period”. Revised was the material about the 1941-42 “anti-fascist resistance”. The traditional term “Turkish yoke”, describing the period of Ottoman occupation (1393-1878) was replaced by “Ottoman presence” so as not to offend the 700,000-strong Turkish minority.

These changes, seemingly cosmetic, provoked the biggest education-centered debate for almost a century. In the highly charged political atmosphere of the time this was to be expected, as the re-named Socialist ex-Communist Party defended its track record both before and after the War and opposed the new interpretation of history, which aimed specifically to de-legitimize that very track record. The media and the public entered into the debate, because any changes to do with history went to the heart of the age-old mission of education to form national identity – to provide the answer to the question, “Who are we?”. Since the first time that question was answered was in the 19th century, and was to do with liberation from “the Turk”, the new appellation of the Ottoman period was roundly rejected. More, some way into the debate the Socialists discovered that, as they were in any case

defending previous interpretations of their own history, they could also stand up against the “Ottoman presence” approach and thereby re-formulate their own identity – away from “Moscow agents” and into “patriots”.

In this way, the education debate was hi-jacked by partisan arguments and became submerged in the more general debate about the future of the country. Was it to be a better socialist society – or a capitalist one? Was it to become a “bridge between West and East”? Or, become fully westernised?

Having won this round against the Democrats, in power for most of the time between 1991 and 1994, the Socialists were back in government, with a full majority, at the end of 1994. The Socialist Minister of Education was again Ilcho Dimitrov – the Professor of history who, while Minister in the 1980s, had sabotaged the then attempts at reform. His self-professed nationalism and strong anti-“Western” sentiment was to colour the educational climate for the coming three years. In this sense, the analysis of the period 1995-97 is an easy task: reform was stopped by the Minister of Education.

The Socialists were convinced that the period after 1989 had been one of needless chaos and destruction, rather than – of attempts at democratic reform. Their declared intention was to return to a better version of the pre-1989 reality. Minister Dimitrov was one of the authors of this ideology, making declarations, such as: “If there is a single unifying characteristic of the post-1989 period – that is the disintegration of statehood. This is felt in all areas, we feel it in education. Our task is to stop this process and strengthen the weakened Bulgarian statehood.”¹⁸

Minister Dimitrov’s position on education reform was that additions, rather than change, was needed – “more teaching of new areas, such as economics, languages, management, law”.¹⁹ “More teaching” was attempted, leading to a massive student overload, and had to be suspended a few years later.

Dimitrov reversed the changes in the history books with the argument that “some textbooks fulfill certain political aims, which interferes with the whole education process”.²⁰ He strongly emphasised the direct link between education and national survival, maintaining that stability, rather than change was of fundamental importance: “We must concentrate all efforts to use as a basis the old and stable foundations of Bulgarian education. This is what will preserve us as a nation...”²¹ The Minister also suspended previous plans for the introduction of religious instruction into schools. He believed that this would lead to the appearance of “American churches”.²²

Insofar as thinking about education reform continued in the period 1994-1997, it came from outside the system – from the World Bank (WB) and from non-government organisations (NGOs). By 1995, the WB had taken a keen interest in education reform as part of its mission to eradicate poverty. It had published two important studies²³, which would have been useful as the basis for policy, had anybody bothered. As it was, the studies failed to have an impact, being mostly quoted by foreign analysts of education reform. Nevertheless, in the period 1992-3 the Bulgarian government made half-hearted attempts to negotiate a loan from the WB for education reform. They stopped under the Socialist government.

Indigenous thinking about education reform concentrated in a cluster of foreign-funded NGOs, and above all – in and around George Soros’ Open Society Foundation. In the first issue of its publication “Open Education” (1992), Dr Rumen Vulchev (during 1997, Deputy Minister of Education) managed to produce the clearest picture for years to come.

Vulchev identified the underlying problem as the inability of education to contribute to the transition: “The past, rather than the future, still define all decisions and proposals for changes in education... at the level of the Ministry, there is no clear conception of the education of the future.”

Vulchev went on to formulate the basic directions of reform, which continue to make sense in the opening years of the 21st century: 1. Overcoming the “alienation of the education system from society”, part of which is the habit of official institutions to launch “reforms” thought up without any consultations with stakeholders and without bothering to recruit public and media support; 2. Development of the capacity, for working together and sustaining change, of the stakeholders in education. Unless this happens, Vulchev warned, stakeholders would find themselves unable to move the conservative and obstinate education establishment into the new world of freedom and initiative. 3. A change in the aims and priorities of education. “In this area”, wrote Vulchev, “change is least evident. There are no observable changes in the attitudes of the main actors in education, and there is no change in curricula and teaching methods”. 4. Changes in the structure of the system – overcoming the complete dependence on the Ministry of Education (MES) of everything and everyone to do with education.

Vulchev, finally, identified as early as 1992 two major sources of possible resistance to reform. One was public apathy: “Unless the system receives a serious jolt from the outside, from society at large, all decisions will easily sink into the prevailing totalitarian system of relations at all

levels of education.” The other – institutional resistance. With the end of Party control, Vulchev warned, unless the education system is opened up, the Ministry – a self-sustaining, quasi-feudal structure, as these things are in late socialism – would become “a self-serving administrative structure with vast powers.”²⁴

When it became obvious that reform was not on the agenda of the government, the NGOs around the Open Society Foundation decided to fill the vacuum. A whole range of projects, funded by Soros, but also by the EU’s democracy programmes, were implemented, mostly to do with teacher qualification, production of modern teaching aids, education of ethnic minorities, integrating schools into their communities, setting up School Boards, disbanded under the 1948 Education Act and so forth.

As soon as the Socialists realised that education reform of sorts was being implemented behind the back of their government, they became insensed. In his televised address to the nation on 15 September 1995, Minister Dimitrov laid down the line. The aims of school education, he said, were, “Bulgarianness, humanity, the intellectual development and physical tempering of every Bulgarian child...” Education was again, and rather urgently, given the task of “saving the nation”: “Only the quality of the nation is capable of compensating our depleting genetic fund.” The policy to achieve this would be based on three things only, and no other: “science, national tradition, general human values”. As for outside aid, the position was: “We do not need charity. Heinous is every kind of help, which uses our current difficulties to undermine national unity, (which) threatens the independence of the state by substituting itself for the responsible state factors, which divides children along ethnic and religious lines and the intelligentsia – along partisan lines, which threatens our cultural identity...”²⁵

Education reform was not only stopped, but it was also branded traitorous.

II. From the old century into the new: reform stalled

Following the collapse of the Socialists’ attempts to revive the centrally-planned economy, mass protests and early elections returned to power the Union of Democratic Forces (UDF), whose 1991-92 government had at least tried to start changes in education. As far as the UDF was concerned, Bulgaria was to become a “normal Western society” (the phrase was coined by the 1991-2 Prime Minister, Philip Dimitrov). This included significant reform and re-structuring of the education system.

In order to get an idea of the situation, the MES did something that had never been done before: it took stock. At the end of the 1997/8 school year, the Ministry tested the knowledge of children, exiting out of the elementary level (4th grade), on the two subjects considered as fundamental: Bulgarian language and mathematics. One-quarter failed to clear the minimum, set by the Ministry. These results posed a significant question mark over the quality of teaching, usually referred to, by almost all players in the education field, as “traditionally superb”. The competence of teachers, teacher training, and teaching methods were thrown in doubt.

This had long been expected by the – few and far between – education reformers, who had refused to abandon the idea of change. What nobody seriously expected was another outcome of the tests: massive failure of children in the areas, dominated by the Turkish minority – Kurdjali, Haskovo and Shumen. This result brought to the fore the whole problematic of exclusion (and minority-majority relations), which had previously been thought a fantasy of meddling NGOs.

The dramatic opening up to the world, which took place after 1997, brought with it an increasing public (and media) awareness of European and American education standards, and the inevitable comparisons with the Bulgarian situation. In December 1997, for the first-(and, to 2005, last-) ever time, representatives of major stakeholders in education gathered together to assess the relevance of a report on the requirements of education in the 21st century, produced by Jacques Delors for UNICEF under the title “Education – the Hidden Treasure”.

The position of the MES, formulated as the outcome of this meeting, was published in January 1998. It was a cautiously formulated, yet sweeping reform plan, closely following the Delors report. The aim of education was re-formulated as “human development”. This was the first time, in the history of Bulgarian education, that the needs of the child – rather than of the nation, or the economy – were explicitly placed, by the government, at the centre of the education process.

The Ministry tried to summarise its intentions thus: “Education must contribute to the full development of every individual. The 21st century will demand of everyone a greater capacity for independent decision-making, self-organisation, self-government and the strengthening of individual responsibility for the common good.”²⁶ This was nothing short of revolution. The inherited education system was structured on a top-down basis, it assumed that knowledge, once memorised, would be sufficient for an entire life-time, and encouraged attitudes of obedience and fear, rather than of independence, initiative and courage.

A revolution was declared, but none was prepared. There was, as yet, no understanding that reform needed to start with re-structuring of the system before starting on the curriculum. In 1998, the

MES was still the largest employer, with three times the staff and property in comparison with the next in line, defence. This massive, heavily centralised establishment was highly unlikely to cooperate in any reform, unless it saw its interests served.

One of our respondents in this project, a deputy-minister at the time, shared this: “We did not realise that all Ministries had survived the winds of change and remained as before, only worse. Under communism, they were subjected to the will of the Party. After that, they just preserved themselves as power-groups of privileged, inter-connected individuals, who would do everything in their power to stop any reform that undermined any privilege”.

Even before any resistance could be encountered, however, Education Minister, Vesselin Metodiev, began beating a retreat from revolutionary declarations. Over-sensitive to the bad image that “education reform” had acquired, he promised the public that he was bringing “stability” to education, and that society would no longer be tortured by a series of meaningless changes and partial reforms²⁷. Having thus opened himself to charges of duplicity for anything he did that looked like change rather than stability, the Minister from the start tied his own hands. The only avenue open was to try and sell changes not as a systemic reform, but as partial improvements – precisely what he had condemned.

In the sphere of *curriculum*, the MES took urgent measures to end the over-burdening, which had resulted from the previous Minister’s “additions”. It cut by half the teaching of natural sciences, reduced the time spent on history and Bulgarian literature, and introduced the system of “voluntary” subjects, which students could choose in order to reach the prescribed minimum of learning. Experiments began with the introduction of the Turkish language and Gypsy dialects in schools in minority areas. History textbooks were again re-written away from the socialist interpretation, and religious instruction finally began. By the end of 1999, the “state minimum” standards (setting out clearly at what level of school education what minimum children should know, what teachers should know, and what minimum knowledge textbooks should contain) had been voted into legislation – something delayed since 1991.

There was also a half-hearted attempt to tackle “civic education”, which had been ignored by a system bent on the formation of national identity, rather than of citizenship. There was to be a “matura” (external examination) in civic education – which meant that the subject was deemed of the first order of importance – but nobody had the first idea what textbooks would look like. No “matura”, nor a textbook have appeared to this day, October 2005.

In terms of *finance*, a very major reform departure over 1998-99 was the declared intention to decentralise the system, delegating powers and funding to the school and its Headmaster. Minister Metodiev also tried to re-integrate the schools into the communities through legislating for the revival of School Boards, dissolved during communism.

The results of the decentralisation drive were partial at best. By the end of 1998, some 100 schools (out of a total of 3,750) had received “delegated budgets”, rather than detailed centrally-set budgets. The idea was for the School Boards to work out how much money a school needed, prove this to the Ministry and get the funds, thereafter controlling their use, together with the headmaster. But Heads of schools did not receive extra powers, and the Boards were badly constructed – rather than every school having a Board, the government tried to set up one Board per municipality, which made no sense. It is not surprising that the “delegated budget” approach remains, in 2005, a “pilot” activity, covering 600 schools out of 3,700.

At no stage was any of this communicated to the public and, coming from a Minister who had promised to stop “incessant change”, led to a veritable storm of protest. Far from being seen as necessary and legitimate, the piecemeal reforms in education were seen as ill-concieved meddling.

For example, the only component of “decentralisation” which reached the public was “optimisation” – the closure of schools where, due to de-population, there were not enough children to form classes for the elementary level of education. The idea was to bus children to the nearest village or town with a fully functioning school. As the student population fell by some 200,000 (from just under 1.2 million in 1997 to just over one million by 2000), the numbers of schools was cut from 3,962 to 3,702.. Badly explained, “optimisation” found no public support, while local communities, headed by their elected representatives, organised resistance to keep their schools because of the employment they provided.

Feeling boxed in, Minister Metodiev and his team reached out for external support. Through 1999 he speeded up negotiations for a World Bank loan for education reform, based on Open Society education work through the 1990s. The three-year loan – part of a nine-year-long strategic reform effort – was called the Education Modernization Project (EMP). It planned a complete restructuring of the education system, at all levels, turning it into something at all points different from the status quo ante: new aims for education; new teaching methods by differently qualified teachers; new curriculum;

new institutions; external examinations; new systems of funding; a dramatic decentralisation of power; open and participatory decision-making and full accountability.

If ever any WB project attempted to implement the Bank's thinking at its best, the EMP was it. Its catastrophic failure, therefore, is not only bound to resonate through Bulgarian education for a long time to come, but it also demonstrates that World Bank thinking – and reform thinking more generally – needs a further overhaul itself.

III. Into the 21st century: reform sabotaged

Any change encounters resistance from the beneficiaries of the status quo and reform can never, therefore, be a simple, top-down technical exercise. Reformers need allies to overcome resistance and attain their aims. In order to assess the context of the EMP (and explain its failure), an outline of the state of mind of the major stakeholders is needed.

In the *MES*, the key stakeholder, things went badly from the start. By January 1999, Minister Metodiev was out. A new Minister, Dimitar Dimitrov, was drafted from the Technical University. Being entirely innocent of knowledge related to the school system (he achieved fame on publicly admitting that he never realised that municipalities, not the *MES*, funded schools), Minister Dimitrov immediately identified reform as a disturbance. On learning of the EMP, he exclaimed: "...but this is money that will have to be repaid by the blood and tears of the people!" He was maneuvered into accepting the EMP when told (untruthfully), that he would have decision-making discretion over the money. He became completely incensed when he realised that, on the contrary, the loan was for specific activities toward quantifiable results; and was enraged further when he realised that the annual \$5 million of the three-year loan would be deducted from the overall budget of the *MES*. In revenge, Minister Dimitrov ignited institutional resistance by personally re-drafting the aim of the WB project. Out went "modernisation" and in came "improvements".²⁸

As far as *public opinion* is concerned, we know very little hard facts prior to 1998. Pollsters did not ask education-related questions for many years, because it was widely assumed that there were no problems worth investigating. There was, however, a flurry of polls published at the end of 1998 and they tell us enough about the state of mind at the time. According to an MBMD poll, only 8 per cent knew that there had been major legislative changes recently. More than half had no idea what were the comparative advantages and disadvantages of the Bulgarian school system. More worryingly, parents did not know what their children were up to while in school. An amazing 78 per cent had no idea what their children liked in school, and an even more amazing 88 per cent of parents had no idea what their children disliked in school.²⁹

Signs of trouble were clear in a poll, published in "Pari" newspaper on 16 September 1998. More than 40 per cent believed that schools did not prepare the young for the world of work and 45 per cent were convinced that schools did not help young people realise their potential.

On the eve of the EMP, there was an obvious public awareness that there were things wrong with the school system. This was a major fact after a century of self-congratulatory satisfaction. Dissatisfaction, however, was more of a general grumbling than a meaningful debate. Such a public would not, ultimately, be a useful ally in any reform attempt.

The *media* continued to see education as fundamentally sound; and reform – as useless tinkering. Newspapers were full of stock-in-trade formulas (we take them at random from the cuttings), such as: "Always, and today, our education has been one of the sources of national pride"; "the high levels of the recent socialist past"; "the universally recognised high quality of Bulgarian education"; "Europe calls our education "brilliant""; "the proverbial quality of Bulgarian education from the 19th century on" and so forth. Therefore, the media would not be an ally in any reforms.

Leading *intellectuals* by and large shared the Socialist belief that the transition was simply wanton destruction. Here is an example, from the highest-circulation newspaper, from Prof. Dragomir Draganov, a historian and media celebrity: "...as a whole the system of people's education managed to survive, more or less in tact and in working shape, during all of these insane "transition" years. And continued to produce Bulgarians, who are second in the world in intellect."³⁰ Sometime later, he completed his vision, criticising the 1998 education legislation: "I hope I am mistaken, but for the first time we seem to be witnesses to the most horrifying instruction, coming from the outside: in terms of intellect our children are to be taken down from the second place they currently and deservedly occupy, and be re-positioned at around 60th or 70th place, as the world's servants and labourers."³¹ Most novelists, playwrights and University professors went on at length in the same vein.

The leading opinion-formers were obviously the enemy, rather than a potential ally of the reform.

The *teaching profession* was of a like mind. Polled by Gallup in 2000³², teachers painted the following dire picture of their schools: 42 per cent had leaking roofs, 38 per cent lacked glass in some of their windows, in 41 per cent toilets were not in working condition, over 40 per cent had no

functioning chemistry or physics labs, and so on. No less than 68 per cent of schools were found to have no computer. Teachers blamed the transition, a massive 80 per cent agreeing with the statement that, “Changes have led to a fall in the quality of education”.

The Gallup pollsters found a way to measure the real level of satisfaction of *parents* with education by hitting on the idea of following their money, rather than simply asking about their opinion. The findings were astonishing. In financial terms, by 2000 there was a parallel education system in the country, roughly 1.5 times the size of the state school system. That was the amount parents paid for private tuition, additional lessons and various bribes. Most of this was “grey economy” – un-taxed and statistically invisible. The key figure in this system was – and is – the school teacher, who teaches the same things to the same children after school, in this way supplementing his / her income with tax-free fees.

Of the attitudes of *school students* of the time we know nothing. Nobody bothered to ask them until after the failure of the EMP, because they were never seen as key participants in education. Not only were they at the very bottom rung of the power ladder, but also (Minister Metodiev’s declarations apart), they were never the aim of an education system constructed around the mission of serving “the nation”, rather than mere individuals.

The EMP had no allies. With the advent, right at the beginning, of an Education Minister hostile to reform, reform no longer had political backing. One of our interviewees, then a senior official, shares this: “By 1999, the Prime Minister had lost interest in education reform, and the Minister was against it. The loan went ahead only because the Deputy-PM in charge of the economy pushed for it, being convinced that failure would reflect on him. As for the EMP itself, we were hoping that it had enough strings attached to the money so that, once up and running, it would drag along the MES, even against its will.”

The WB project was intended to be the first of three separate phases of a general modernisation effort. The first phase – i.e. the EMP itself - was to last three years. Its objectives, as summarised by the WB, were: “...modernizing state institutions, establishing new organizational structures, developing greater technical capacity, and setting the necessary foundation for the reform. In line with this,” the WB went on in its final report, “the first phase was designed to establish the institutional foundations for modernizing the education system.”³³

The second phase was planned to last for another three years. It was to help the government implement the new standards. To do this, funding would be provided to: (i) improve professional skills of educators; (ii) procure modern education materials and equipment; (iii) structure the planning, monitoring and evaluation capacity of the education system; (iv) reform the resource allocation system; (v) change the management of resources in the system.

The third phase, also three years, was vaguely formulated as: “focus on adjusting and consolidating the changes introduced during the previous two phases and establishing a demand-driven system of in-service teacher training.”³⁴

By 2003, the World Bank had found that only 5 per cent of the EMP loan was actually used, and that – primarily for procurement for the MES. Of the dozens of new institutions, supposed to be up and running by that time, a handful existed on paper, a couple had met a few times – and none had provided any product whatsoever, not even minutes of meetings.

The attempt to construct the institutional basis for future change had failed completely. The Bank discontinued the exercise, ending it with what must be one of the saddest sentences in any international project: “alternative options for project restructuring would no longer be pursued.”³⁵

A careful reading of all relevant documentation related to the EMP leads to the following conclusion. From the beginning, the MES avoided, duplicated, did not provide regulations or conditions for, delayed, disorganised, refused to get involved in and otherwise sabotaged the activities designed to construct the institutional and human resource basis for the reform. The very institution, expected to spear-head the reform for a decade ahead, to explain and “sell” it to all stakeholders and to the public at large, to defend it against criticism – that institution sabotaged it with determination, gusto and, ultimately, success. For most of the time, the MES was left to act alone and therefore – unchecked by others. Society at large was only partially aware of the EMP and no education stakeholder at any time participated in the process.

We now know enough to be able to reconstruct the Why’s and the How’s of the institutional sabotage, as well as draw conclusions and provide recommendations.

The traditional administrative culture of countries such as Bulgaria, known as “legal dogmatism”, is an over-regulatory one. This is the reason why Bulgarian laws look more like detailed job descriptions, rather than as legislation. This is also true of the latest version of the Education Law, 2003. One of Bulgaria’s leading education reformers, Professor Bogdan Bogdanov, called it: “An endlessly amusing document, being a handbook of rules, rather than a law; it tries to foresee every

conceivable situation, because it is based on a lack of trust.”³⁶ The lack of trust leads to a dogged refusal to cooperate across Ministries, or even, between departments of the same Ministry, let alone open up to the public or to independent expertise.

Regarding the EMP, the following major complications arise out of such realities.

First is the obvious consideration that opaque administrations, used to being instructed to the last detail, *will not carry out any tasks, unless these tasks are written in detail in some regulatory document* – better still, in legislation – and then written into the job description of the bureaucrat in question. By its very nature, the EMP could not be so placed into the existing chain of command. It had its own managerial structure, which did not fit into any of the existing chains of command. This is the reason that the existing chains of command boycotted it, the EMP found great difficulty in recruiting managerial staff, and its managers changed with such frequency.

Even had they wanted to do anything, the few MES reformers would have found that there was nobody to work with. Every department would want a direct order from a direct superior before doing anything connected to the EMP. More: at any given time, any staff member of the MES, working on the EMP, could be reasonably accused of not doing their proper job – the one that was in the existing chains of command and in their job description.

Again, the nature of Bulgarian administrative tradition and practice explains why so few of the outside experts, funded by the WB, were called by the MES to work on the EMP. This fact genuinely puzzles the World Bank, as seen in its final report on the EMP, but the explanation is not a difficult one. The MES could find no place for officially – by the Minister – established institutions of the EMP, so there was no way the Ministry would be capable of accommodating experts (“free flyers”, as they are known to Bulgarian bureaucrats) who are not apparently part of anyone’s chain of command.

In order to be able to accommodate something like the EMP, the bureaucracy implementing it would have to be one that: a/ had a tradition of operational autonomy in achieving the targets of policy; b/ had an institutional culture of serving the common good; and c/ could turn set policy targets into organisational measures and activities. None of this was true in the case of the MES, or of any other Bulgarian state institution. They had all successfully opposed all attempts at administrative modernisation in the 1990s. As for policy, the EU’s Annual Progress Reports on Bulgaria in the 2000s repeatedly noted that Ministry staff simply do not understand what policy is – let alone what to do with it, how to plan and implement it, how to evaluate the outcome and so forth.

The *second* complication regarding the EMP, arising out of the administrative realities of Bulgaria, is to do with the *structure of responsibility*. Under a regime of “legal dogmatism” administrations do not evaluate work with reference to results. Stimuli and sanctions are linked to whether the civil servant does, or does not do the things in the job description and / or in the laws and regulations. There was no way that the MES, for example, could promote anyone for doing a good job on the EMP, without causing a major upheaval in the entire institution. Everyone else would be asking: Why is this person being promoted for *not* doing their proper job? By the same token, there was no way that the MES could punish any of its members for not being involved in the EMP, or for carrying out badly EMP-related tasks – because work on a project is not something that is in the job description, or in the regulations.

More: the last thing that “legal-dogmatic” administrations want is to be judged by *result*, rather than by *process*. In a process-driven organisation, you clock in at 9, clock out at 5 and in the meantime put numbers to incoming pieces of paper, passing them on to the person at the next desk. This is process: as long as you do this and nothing else, you do not attract punishment. The EMP, however, was structured around results. Working for results is risky business (lack of results is too easily visible) and that is why administrators avoid it. It is, also, too complicated. To get results, you would need all the modern skills that process-driven administrators do not possess: analysis, policy-making, planning, resource management, negotiation and problem-solving skills and so forth. And the absence of precisely such skills, labeled “lack of capacity”, is something that the EU continues to this day to highlight regarding Bulgarian institutions.

The *third* complication is to do with *administrative attitudes to other players* in the same field. Bulgarian-type administrations are command-driven (i.e. up-down) systems – you only do what you are told to do by your superior. They are not contractual (horizontal) systems – i.e. you do not do things contractually agreed, between equals, with others inside or outside the system. You are not equals.

Therefore, no agreement with stakeholders or funders (“outsiders”) is ever binding; and no servant can be brought to account for having broken such an agreement.

The *fourth* complication is the aversion of Bulgarian-type institutions to *accountability, scrutiny and transparency*. Official institutions can pursue their own particular, sectional and individual interests only if they remain closed to outside scrutiny. The success of the EMP project, however, depended entirely on accountability. There were strategies to be worked out and consulted

with outside experts and education stakeholders. There were results to be achieved, communicated and evaluated. There were co-owned, participatory institutions to be constructed (such as the Curriculum Commission). There were standards to be produced, available to the public, information systems to be created, monitoring of all sorts, external examinations, evaluation of educational outcomes. This was all too much for an organisation so secretive that it does not even keep a rudimentary paper trail, as all researchers of the MES have found.

Bulgarian sociologist and education reformer Dr Petya Kabakchieva, explains: “Today, official institutions are the sum total of inter-personal relations, the product of which is a culture of gossip, corridor intrigue, and of informal decision-making. This automatically means that problems are solved outside of the public arena, because this type of culture exists outside of the publicly accepted rules.”³⁷

A team of independent education experts, hired by the Open Society Foundation – Sofia (OSF) to monitor the evolution of the EMP, came to the following conclusion: “The MES has ceased to be an institutional instrument for the carrying out of *educational* policy in the *public interest* and is becoming an arena for behind-the-scenes conflict between various organised interests.”³⁸

Above all, as part of the EMP, the MES – i.e. the entire education establishment – was supposed to reconstruct itself, in order to be a viable instrument for reform. This is the reason that the EMP concentrated on setting up institutions, information banks, databases and performance benchmarks. This presented the system with immediate danger. The 110,000 individuals employed by the school system faced severe disruptions of “life-by-process”, lived away from public scrutiny and accountability. Accountability would also mean the end of untaxed income from the parallel system of education, whereas transparency would lead the public to pose questions, such as: “Why are 110,000 people drawing salaries to educate 900,000 students? Is this proportion right?”

The OSF-funded EMP monitors illustrate this thus: “...the success of the initiative (i.e. to sabotage the EMP) is explained, first, by the absence of public legitimacy of the reform project and, second, by the combination between the lack of individual motivation for reform and the existence of a strong group motivation to preserve the status quo”.³⁹

This was simply done and not difficult to understand or recount.

First came the “taming” of the EMP, when Minister Dimitrov re-drafted its aims from “modernisation” to “improvements”. Modernisation required the MES to re-invent itself, whereas “improvements” could be pasted on to existing ways of doing things. The re-drafting ensured that any EMP activities were, from this moment on, to be legitimately treated as disparate initiatives, to be implemented along the usual procedures – or lack of such.

Second came the refusal to build the institutions, supposed to implement the EMP and, at the same time, become the backbone of the future (new, improved, re-structured) MES. The only institution created, which actually functioned was the Project Management Unit. However, that Unit’s only reportable activity was furniture procurement.

Third came the shutting off of the project from any chance of accountability or scrutiny. No component of the EMP, to do with establishing control and transparency, was ever implemented. Activities supposed to communicate the project to the public never happened. The institutions supposed to liaise between the MES and other stakeholders were not created. Also never established was the information system aimed at helping the MES itself keep track of the use of resources, drop-out rates and so forth.

This last failure defies logic – but only seemingly. Any integrated information system, albeit for internal use only, posed the same threat as any other information system. Too many things would become obvious – such as inefficiencies and duplication of resources, funding gone missing, too much discretion exercised, illogical funding or procurement decisions and so forth – which could lead to sanctions, efficiency, re-structuring and loss of jobs.

Inside the MES itself, staff specifically appointed to carry out EMP-associated activities were not briefed on the essence of the EMP, nor provided with the EMP itself. Instead, for internal use the MES produced a handbook, which disguised the entire logic and structure of the EMP. It did not refer to the problems which the EMP was supposed to resolve, nor to the results and outcomes expected. Whole sections of the EMP were missing, such as the strengthening of the capacity of the MES, and attaining a new management model in education. Unable to access the EMP itself, on the basis of the handbook, the only impression MES staff could form was that the WB was simply topping up the Ministry’s budget.

Fourth came the dissociation of the MES from the entire matter. No Ministry document ever referred to the MES as “owner” of the reform, nor – as the key implementing institution. The EMP itself was referred to as “that World Bank loan”.

Reforming societies cannot attain their aims without reform of education. Reform of education, however, has now been demonstrated to be impossible without reform of society. The conclusion, in this vein, of the OSF-funded EMP monitoring team seems to leave little hope: "...reform of education is, no more and no less, reform of the state itself, and this means a fundamental restructuring of the life of society. Let us not forget that what we have before us is a state that had managed to replace society, or, to put it differently, the state is the dominating principle of societal connections."⁴⁰

New democracies do, indeed, find it difficult to tackle education reform, but there have also been successes. Heavily bureaucratic countries have managed to conduct sweeping education reforms in recent years.⁴¹ Reform is not impossible by definition. It's the way you go about it that defines its results.

Aftermath and next steps

By the time of the 2005 election campaign, the general unease about education had translated itself into a cross-the-board political agreement that reform of education was a necessity. There has been a clear shift in *political will* in the direction of reform. As the history of reform has illustrated at least since 1959, however, political will is only one factor in the equation. Reformers must take into account the attitudes of all stakeholders. Taken thus, this is the situation obtaining in 2005.

At *Ministerial* level, the picture has rarely been so sombre. After the collapse of the EMP at the end of 2003, the MES put up a smokescreen of frenzied and contradictory activities, in order to demonstrate that "reform" was still going on. As usual, its various intentions fit into no system and, once made public, cancelled each other out. Instead of keeping the EMP debacle behind a smoke-screen, the smoke itself attracted attention and the public began turning against the MES. In response, the MES launched a "Strategy for the development of the system of secondary education in Bulgaria" in 2004. The document looked deliberately designed so as to demonstrate that the MES line on education had not changed. There was no crisis, no major problem and the system did not require transformation. There was no mention of "modernisation", nor any reference either to the EMP or the World Bank. The strongest term used was "changes", heavily qualified, as in: "Changes in education must reaffirm the cultural traditions of the nation".

The basic premise of the document was that education was not failing society: "During the last ten years... the education system in its development was "moving up" with the development of society".⁴² The MES listed 9 aims (plus 15 sub-aims) of education, among which, "to build physically and morally healthy and work-suited individuals, ready to shoulder civic responsibilities" and "to form national consciousness, to teach and upbringing the young in love of fatherland, love and respect for one's place of birth and empathy with the global problems of humanity".

This nonsense was so blatant that the part of government expected to finance education, the Ministry of Finance (MF), rejected it out of hand and, going against all tradition, produced its own strategic paper on secondary education reform only months later. Called, neutrally enough, "Overview of public spending – Education: current situation, problems and potentials", the MF's document started with the statement that: "there is a definite deficiency of basic skills of the workforce, mainly interdisciplinary and inter-professional skills and key qualifications. There is a deficit of in professions connected with new technology in production, services, agriculture and entrepreneurship".⁴³

The MF dismissed the MES strategy thus: "...its basic weaknesses are the lack of a vision about the necessity of reform in this sector, a review of the problems facing education in Bulgaria at all levels, the risks facing the reform, the quality in the sector etc". Unlike the MES, the MF produced not only an analysis of problems, but also an aim for education reform (this is not the same as having an aim for education, which is more difficult, but is a start): "the creation of a contemporary system of secondary education in Bulgaria, which fits in with existing European standards and provides quality education services to the population".⁴⁴

Again unlike the MES, the MF formulated the problem with the funding of education: "the lack of defined aims and programmes leads to lack of control over the way funds are spent and whether their spending has attained results. At this stage the MES is not bound to attain any results within the limits of the funding it receives, as it is not bound to formulate or implement any policies, or carry responsibility for results and outcomes." Whereupon the MF explained the fundamental motivation of the MES: "The motivation of the managers of the sector (i.e. secondary education) is directed at constantly increasing the volume of spending and the possibilities for the administrative (i.e. by discretion) redistribution of funds".

The MF also picked up on the fact that the levels of funding of the different schools depended on "the evaluation of the civil servants involved", and complained that the MES continued to break the 2003 version of the Education Law by refusing to produce criteria for the funding of schools. Other problems the MF outlined was over-staffing (40 per cent, compared to the practices of "developed

countries”), the lack of headmaster power to manage funds, the lack of any evaluation criteria for the management of the entire system, lack of dialogue with other stakeholders and the public, the weakness of the traditional authoritarian models of teaching and the lack of a system to evaluate and monitor the quality of the educational product.

In effect, the MF’s document incorporated the recommendations of the 1998-2003 international studies; and also identified as chief weakness, which required reform, more or less the same problems that were at the basis of the EMP. The outcome is that, at the very least, future education reformers have a government document from which to start. Unfortunately, this document does not come from the MES, which creates plentiful opportunities for endless administrative subterfuge. By the summer of 2005, the MES responded to the challenge by sacking every single individual connected to the EMP.

Among other stakeholders, the *media* has now shifted its position, by and large siding with reform. The prevailing tone is the following, taken from an article in the second-biggest circulated daily, “24 chassa”, written by its Deputy Editor-in-Chief, Borislav Zumbulev: “A key skill of modern nations is the reading of books. Bulgarian education, however, represses this skill with its system, designed for the memorising of brainless lists of what a poet or novelist is supposed to have had in mind... The system is such that it makes people hate and loathe reathing.”⁴⁵

Interestingly, in this the media is, for once, ahead of *public opinion*. A 2005 poll by the parliament’s polling agency, NCIOM, revealed that more than half of Bulgarians were confident that Bulgarian education was of “European standards”, with 15 per cent maintaining that Bulgarian education provided higher than European standards. Only 20 per cent – the poorest respondents – thought Bulgarian education as worse than education in the EU.⁴⁶

While the *school students* still have no voice in the debate, and are seldom polled, what we do know is that they are not happy with the system and would align with reforms. “They do not make us think at school,” they told the President during a visit in the spring of 2004. “We spend more time in school than at home, but nobody makes us feel part of the school... teachers tell us that for the money they are paid they are not going to take their job seriously... Subjects which we find important for us are routinely neglected or lessons are not held – such as AIDS, drug abuse”.⁴⁷ A year later, the situation was the same in the weekly “Kapital of 28 May-3 June: “The teachers give you the matrix and if you stray outside of it, you are doomed. They tell us directly: “ability to memorise is the only thing which will get you into University”. And you just stop thinking.”

The *parents* are by and large absent from the debate, although they are obviously very critical of the system, given that they spend so much on education outside of it. In a group discussion we held with stakeholders, the Chair of the Association of Parents specified four basic problems: a/ the power-structure of education, in which the student plays the victim; b/ the lack of modern curriculum; c/ the lack of external examinations; d/ the lack of government policy placing the student at the basis of the system. The Chair proposed a reform with a twist – the emphasis being on rapid and dramatic de-centralisation, plus participation and feedback via fully functioning School Boards.

There has obviously been some evolution, in the parent community, towards support for reform.

The bulk of *headmasters and teachers* continue to oppose all reform. When, in late November 2005 Education Minister Vulchev declared that reform was unavoidable if education was to survive, the teaching unions immediately demanded a 15 per cent pay rise, additional appointments (rather than cuts in their numbers) and declared the first general strike of the 21st century.

Leading intellectuals are, as always, against education reform. Not one has changed sides or toned down opposition to change.

International players are also important stakeholders. They bring in the perspective, knowledge and experience of the outside world, and also provide criteria and targeted funding. There are, by 2005, not many of them active in the Bulgarian arena. The WB is still smarting from the failure of the EMP and has no plans for targeted work on education. The EU has no Directives – i.e. binding recommendations – in education. This means that reformers are unable, as in other fields, to argue that since the EU has *acquis* that need to be implemented, Bulgaria must inevitably go ahead and do this.

The EU does have guidelines, which are not binding, but are very useful, particularly – the 2000 guidelines regarding school-level education.⁴⁸ Taken together with other key international documents, such as the OECD’s material on the “knowledge-based economy”⁴⁹, such guidelines form a useful starting base for any future reformers.

Next steps

The evolution of key stakeholders, as well as the appearance of some political will in favour of education reform, means that planning for the next attempt at modernisation is not a waste of time. It is best to be fully prepared to act immediately the conditions, described by the World Bank itself

sometime ago, are right: “change comes when the incentives to throw out the old policies and old institutional arrangements become stronger than the incentives to keep them”.⁵⁰

An efficient way of planning, in the meantime, would be to think systemically and on two distinct levels: a/ strategy (philosophical basis); b/ tactics (lessons learned and mistakes to be avoided).

Strategy. The *philosophical* foundations must be constructed on the understanding that in Bulgarian education, knowledge and power are fused in the institutions of education, which have a vested interest to oppose reform. Therefore, thinking about institutions – the structural framework of reform – must come before all else, as it did in the EMP. In order to avoid the EMP’s failings in this field, implementing the following approach would be useful. It is based on a slightly re-focused understanding of the “World Development Report 1997”.

The less developed a country, the less likely is its bureaucracy to act as per Max Weber: as a de-personalised and objective machine, guaranteeing equal access and coordinating society’s efforts towards agreed goals. It is more likely to see itself in Hegelian terms: as a “universal” body, linking the defective citizenry to the Idea, embodied in the state.⁵¹ It is likely to behave as a separate (from society) organism, with its own undeclared aims, codes and ethics.

This happens because state bureaucracy functions under special circumstances, unavailable to anyone else. It is sheltered from the winds that keep everyone else on their toes: the wind of *competition* and the wind of *accountability*. State bureaucracy is a monopoly. There is no marketplace where it must prove itself. The well-being of the bureaucrat, therefore, does not depend on his/her effectiveness, but on other skills (office politics, intrigue, obedience). State bureaucracy is not subject to real control because there is nowhere control can come from. Its political masters are a temporary phenomenon and can be always out-lived; the citizenry has no effective means for ongoing control.

The Bulgarian education establishment is just such a phenomenon. The way forward, philosophically speaking, obviously lies in: the introduction of competition on the one hand, and of control on the other. These should be the principles, underlying reform.

As soon as reform thinking moves along these tracks, the various components of reform fall into their natural places.

Introducing *competition* entails complementary initiatives, such as:

- Introducing competition between schools. This means decentralising power to the Heads and the school Boards, as well as taking funding away from schools, in order to concentrate it on the students. If “the money follows the student”, then student choice becomes the basis for funding – and so competition between schools (and even – municipalities) is introduced. This would also reflect on training and teaching methods: students would avoid old-style authoritarian teachers and opt for better qualified teachers using student-friendly approaches to learning.
- Introducing competitive curricula. Once the principle of external examinations is accepted, this would immediately free the students from their dependence on the good will of the teacher – who teaches and also examines. Then different national examination boards, offering different curricula, can be erected and licensed, in order to introduce competition at the level of curriculum, while the role of the state would be to enforce minimum standards.
- Empowerment of school Heads and Boards to introduce significant wage differentials for teachers, linked to the performance of their students in the external examinations.
- Lifting the remaining restrictions on private education, which would further strengthen the competitive element of education. Construction of a system of public scholarships for gifted children to be privately educated.

Accountability is not simply “control”. It involves the empowerment of a multitude of actors, who can then hold the central bureaucracy accountable:

- Immediate introduction of external examinations as the way to evaluate objectively the capacity of teachers and schools.
- Immediate construction of all information systems and data-bases, as per the EMP, with the aim of making the system transparent and accountable.
- Decentralisation of decision-making towards the municipalities (who foot the bill anyway, but have no voice in decisions) and the Heads of schools. This would not only lead to better (and more competitive) management, but also – to forward planning, something which does not currently exist at any level of the education system.
- Decentralisation of funding along the logic of “delegated budgets”. Ending all individual discretion (which is currently the only basis for MES fund allocation) over funding. Empowerment of schools and Boards to seek a variety of funding.
- Creation, at all levels (municipal-regional-national) of a network of advisory and control bodies, with the participation of all stakeholders. In this, what is needed is a simple revival of the failed EMP, which provided for just such a network.

- All educational institutions, starting with the MES, to be legally obliged to formulate annual, three-yearly and five-yearly goals, to be then judged against by independent auditors and by the public at large. Funding to depend on the outcomes of independent evaluations. The MES to be “results-funded” rather than receiving funding on the basis of “declared needs”.
- Official encouragement for voluntary adherence, at all levels of the system, to EU education guidelines and other relevant international standard-setting documentation.
- Creation of an easy-to-use complaints system, including a national Education Ombudsman.
- A decisive implementation of the (repeatedly failed) reform of the entire state administration.

Tactics. Anyone, from here on, who decides to carry out education reform in Bulgaria, will have to take into account the following:

- Be serious. Failed reform sets things back to before the status quo ante. Successful opponents become stronger and more aggressive, and all reform enthusiasts in institutions get sacked.
- Know what your predecessors tried to do and why they failed. Otherwise you will fall into old traps.
- Education reform means system change and is as difficult as “regime change”. Coalition-building is essential.
- Education reform can only be a systemic set of activities. Sectional interests will always be able to scupper partial attempts at reform.
- Any administrative institution at any given time should be assumed to be, on balance, against reform.
- Reform is not a job only for the Ministry of Education, but it cannot be done without it. Part of the failure of the EMP was that reformers attempted to circumvent the MES apparatus, believing that once work starts, the Ministry would at worst be a dead weight to drag along. They had no contingency plans what to do if the MES was not a dead weight, but an active saboteur.
- Ownership of the reform by the government, while not a sufficient, is a critical pre-condition for success.
- Resolute and determined political will is needed for the entire length of the reform process. This will should be embodied in institutions (parties, governments), rather than in individuals because, should their interest in reform wane, so will the reform wilt.
- You can’t achieve reform by going behind the back of the public because, when opposition to reform begins, the public will turn against you. Reform has to be communicated at every stage, from the planning to completion. All stakeholders need to be constantly in the process, kept informed and feel ownership.
- To allay public fears, you need to come up with answers to the two historic questions to do with education – upward mobility and national identity. You need to convince the public that there are other avenues for mobility but state service. You also need to convince the public that reform does not threaten the national identity, but rather enriches it.
- Opponents need to be given a reason to be at least neutral. Buying them off (see the history of privatisation) is preferable to keeping them on the other side of the barricade.

Conclusion

The transition from a totalitarian to a democratic system calls for restructuring institutions, culture, everyday life, beliefs and practices of a society. Without reform in school education, transition is not sustainable, thus leaving the country ill-developed, prospect-less and volatile.

For reform to succeed, you need a strong and motivated reforming government, backed by relentlessly determined public opinion, moving fast to re-fashion the power structure, demolishing dug-in administrative interests. For reform to fail, you need a weak and vacillating government, lacking in public support, unable to re-design the power structure and thereby having its reforms sabotaged by entrenched administrative interests.

Bulgaria’s education reform illustrates the second option.

Institutionally, the education establishment proved able to stop reform by re-formulating and diluting its aims, and by side-tracking its activities. Correctly, the MES grasped that modernisation means the re-distribution of power and the empowerment of other societal agents, and therefore –loss of control and resources. Unlike the Ministry of Economy, which did not succeed in stopping privatisation, the education establishment managed to mobilise public anxieties and defeated all governments.

Culturally, the public continually suspected that “reform” would undermine the two historic aims of education: the upholding of national identity and of providing equal upward mobility avenues for all Bulgarians.

Future reform attempts would have to: be underpinned by sustained and resolute political will; allay fears related to mobility and national pride; rely on prior coalition-building among all stakeholders; rapidly empower students, parents and School Boards; maintain a high-profile media presence; break personal dependence by a decisive introduction of external examinations and objective evaluation of school performance; demonstrate the ability to resolve the problems of exclusion (disabled, minorities); and increase choice by de-centralising finance.

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- ¹ The latest in this line is Polishchuk, L. (2002) *Evolving demand for institutions in transition economies*, *Center for Institutional Reform and the Informal Sector (IRIS) at the University of Maryland, College Park*, <http://www.nes.ru/english/about/10th-Anniversary/papers-pdf/Polishchuk.pdf>
- ² Попова, Е. (2005) Образованието крета след бизнеса, *Капитал*, 19 (14-20 май 2005), с. 12.
- ³ Петрова, Т. (2003) Ученическите бисери – забава за канибали, *Сега*, (26 юли 2003), с. 7.
- ⁴ Дневник, (9 ноември 2004).
- ⁵ Crighton, J., Rapporteur, G., Coolahan, J., Cuadro, E., Damyanovic, U., Huppert, J., Pranckuniene, E., Stromberger, C. & Whitman, I. (22-Mar-2002) *Report on education in Bulgaria*, Organisation for Economic Co-operation and Development, [http://www.oecd.org/OLIS/2001DOC.NSF/LINKTO/CCNM-DEELSA-ED\(2001\)4](http://www.oecd.org/OLIS/2001DOC.NSF/LINKTO/CCNM-DEELSA-ED(2001)4)
- ⁶ Михайлов, Д. & Желязкова, А. (2003) *Окончателен доклад по проект: Оценка на съществуващите образователни политики и практики за предоставяне на равен достъп до обучение на деца от малцинствата и за разработване на препоръки за устойчиво решение на образователните проблеми на малцинствата*, Международен център за изследване на малцинствата и културните взаимодействия, [http://www.ncedi.government.bg/Report%20ASA%202003%20belejki_1%20\(1\).htm](http://www.ncedi.government.bg/Report%20ASA%202003%20belejki_1%20(1).htm)
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- ⁸ A list of fairly recent relevant literature (dealing with education, as well as with institutional resistance to reform) would include:
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[http://wbln0018.worldbank.org/eurvp/web.nsf/Pages/paper+by+Mushtaq+Khan/\\$File/KHAN+STATE+FAILURE.PDF](http://wbln0018.worldbank.org/eurvp/web.nsf/Pages/paper+by+Mushtaq+Khan/$File/KHAN+STATE+FAILURE.PDF)
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⁹ Something, which became belatedly clear to Taiwanese Finance Minister, Lin Chuan, when banking reform, failed to deliver in 2005. See: The Taipei Times (Tuesday, Sep 27, 2005) pp. 10.

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¹¹ Politiki (April 2005).

¹² Еленков, И. (2004) Реформите в образованието и техният смисъл в контекста на българските модернизационни проекти до края на 80-те години на ХХ век, в: *Държавата срещу реформите*, с. 19 (София, Изток-Запад, 2004).

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