



## Blagoevgrad, Bulgaria

### Real support for people in disadvantaged situations: Long-term unemployed serving the isolated elderly and ill<sup>1</sup>

**Name of the policy:** Real Support for People in Disadvantaged Situations

**Start date:** April 2004

**Completion date:** December 2007

#### CONTEXT

##### GOVERNMENTAL CONTEXT

##### City context

Blagoevgrad is a medium-sized Bulgarian city with a population of 70,404 citizens, with a slight prevalence of females over males among residents (respectively 52.19% and 47.81%). Given the general trend of population aging and a decreasing share of the population of active working

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<sup>1</sup> The **Inclusive Cities Observatory** is a space for analysis and reflection on local social inclusion policies. It contains over sixty case studies on innovative policies for community development, access to basic services, gender equality, environmental protection and the eradication of poverty, among others. The initiative has been developed with the scientific support of Prof. Yves Cabannes from the University College of London (15 case studies) and a team of researchers from the Centre for Social Studies (CES) at the University of Coimbra, which has worked under the supervision of Prof. Boaventura de Sousa Santos (50 study cases). This Observatory aims to identify and investigate successful experiences that might inspire other cities to design and implement their own social inclusion policies.

The **Inclusive Cities Observatory** has been created by the Committee on Social Inclusion, Participatory Democracy and Human Rights of UCLG. United Cities and Local Governments (UCLG) is the global platform that represents and defends the interests of local governments before the international community and works to give cities more political influence on global governance. The **Committee on Social Inclusion, Participatory Democracy and Human Rights** aims to contribute to building a common voice for the cities of UCLG in the areas of social inclusion, participatory democracy and human rights. It also aims to guide local governments in designing these policies and to that end, fosters political debates, the exchange of experiences and peer learning among cities around the world.

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age (the average for the country is 63.2%), the situation in Blagoevgrad is comparatively favourable with 68.10% of the population between ages 18 and 59 and 15.87% aged 60+ (2009). The distribution of population in Blagoevgrad district and municipality by ethnicity is presented in Table 1.

Behind the obvious difference in the ethnic composition of the population in the city of Blagoevgrad (the Blagoevgrad municipality) and the Blagoevgrad district there is another hidden structural imbalance: the people of Turkish ethnicity are of predominantly rural origin and live in mountain villages. They also have lower degrees of education, a tendency which is even more evident with the Roma minority (Hristova 2004, Mediana Agency 2007). Table 2 presents the distribution of educational levels attained by the population in the Blagoevgrad district of aged 7+.

Altogether, these social characteristics affect the unemployment rate in the Blagoevgrad district, which is traditionally higher than the average level for the country. According to the regional employment office, at the end of October 2010 the unemployment in the district was 11.15%, while the average for the country was 9.5%. Of all registered unemployed people in the Blagoevgrad district, 53.5% are women and 38% are 50+ years of age. Youth (up to 29 years of age) unemployment, however, is 17.8%, which lower than the average youth unemployment rate for the country as a whole, 21.4%. Regarding the education levels of the unemployed, statistics show that: 45.2% have high secondary education, 29.1% have low secondary education, 17% have primary school, and 8.7% have bachelor and master's degrees (see Table 1). The deindustrialization of the district and its transition to a tertiary economy of services has also had an impact on the professional structure of the unemployed: 53.3% of them are without any profession or specialty, 25.9% are workers, and 20.6% are specialists. Ultimately, the unemployment, the aging of the population, and the unfavourable educational structure turn into permanent social problems for the population of Blagoevgrad city and district.

**Table 1. Ethnicity of the Blagoevgrad district population**

<b>Ethnicity</b>	<b>Blagoevgrad district (%)</b>	<b>Blagoevgrad municipality (%)</b>
Bulgarians	83.97	95.69
<b>Turks</b>	<b>9.33</b>	<b>0.1</b>
<b>Roma</b>	<b>3.64</b>	<b>2.58</b>
<b>Others</b>	<b>1.62</b>	<b>0.97</b>
<b>Not self-identified</b>	<b>1.24</b>	<b>0.38</b>
<b>No answer</b>	<b>0.19</b>	<b>0.25</b>

Source: 2001 Census

**Table 2. Educational levels of the Blagoevgrad district and municipality population (aged 7+ years) and registered unemployed residents in the district**

Level of education	Blagoevgrad district population (aged 7+ years) (%)	Blagoevgrad municipality population (aged 7+ years) %	Registered unemployed in the Blagoevgrad district (%)
Higher education (bachelor and master's degrees)	6.39	12.68	8.7
College	3.39	4.14	
High secondary school (12 grades)	36.21	46.00	45.2
Low secondary school (7 grades)	29.47	21.68	29.1
Primary school (4 grades)	15.37	14.42 <sup>2</sup>	17.0
Unfinished primary school	6.82		
Illiterate	1.75	0.65	
No answer	0.17	0.26	

Source: 2001 Census

### Governmental decentralization context

According to the Bulgarian Constitution (adopted 12 July 1991), the Republic of Bulgaria is an integral state with local self-government. The present territorial-administrative division of the country into 28 administrative districts comprising 264 municipalities was implemented in 1999 and reflects the trend towards increasing decentralization of state power. Blagoevgrad is an administrative center of the sixth biggest Bulgarian district with a population of 329,000 and with multilayered government (mayor, municipal council, district council) which was foreseen in the Act for Local Self-Government. The emergence of civil society and the development of new social actors of urban governance (local NGOs) is a comparatively new process in the post-socialist Bulgarian society since the beginning of the 1990s, and is also a factor in the re-allocation of community resources necessary to manage the new disparities of social transition.

**Institutional level of policy development:** Submunicipal, Municipal, District, Region, National, and Intercommunal (multiple communities)

### SOCIAL CONTEXT

The importance of this initiative can be better understood against the background of the national social-demographic and economic situation. Four social conditions or contexts are key: an aging population, a growing proportion of youth with Roma origins, persistent and high unemployment, and outdated social systems.

<sup>2</sup> This figure refers also to those who are with unfinished primary school.

First, like many other Eastern European countries, the Bulgarian population is getting older and out of the active working age. According to a World Bank report on demographic trends in the region (Dempsey 2007), by 2025 between one-fifth and one-quarter of the population in Eastern Europe will be 65 years and older. According to the National Statistical Institute in Bulgaria, the 65+ years age group comprised 22-23% of the Bulgarian population during the last decade. The EUROSTAT prognosis for Bulgaria is that by the middle of the twenty-first century, Bulgaria will lose 35% of its population. The growing group of solitary older people is not a mere personal problem but is also a problem of the whole society.

Second, the only group growing relatively and absolutely in numbers is the Roma minority which, at present, comprises around 5% of the population. According to data from a national representative sociological survey (Mediana Agency 2007), Roma young people, in comparison with youth in other ethnic groups, are typically in the worst living conditions: 52.2% of Roma youth are poor in comparison with 24.6% of those of Turkish minority and 9% of Bulgarian youth (15-35 years of age). Further, 69.1% of Roma youth (18-24 years of age) are unemployed in comparison with 11.4% of the Bulgarian youth and 34.2% of Turkish youth. This is usually explained as a result of the Roma youths' poor education and lack of qualifications. Nevertheless, as the authors of the survey confirm, given the present birth and mortality rates, over the next 30 years half of the Bulgarian young people will be of Roma origin. It means that new long-term social policies must be designed to cope with this new social situation.

Third, Bulgaria is still suffering from comparatively high and persistent unemployment. The unemployed at pre-retirement age (above 50 years of age) are among those most affected by the economic restructuring and massive lay-offs. According to 2001 statistical data, their number has exceeded 135,000 and has been constantly growing. The rate surpassed a 30% average annual increase for the years 1999 and 2000. The social status of registered unemployed at pre-retirement age has its economic as well as moral aspects. Such people are the first to be laid-off. Being near the end of their professional careers, they have little chance to enter back into the formal economy. Therefore, they are forced to survive on unemployment/social benefits or to look for a low-skilled job in the 'informal' labour market. Thus, long-term unemployment becomes not only an issue of low income and growing poverty. Bearing in mind the fast growth of unemployment among this group of the population, it could develop into a social problem leading to the segregation of Bulgarian society by age.

Finally, by the time the project was implemented, the centralized system of social services was outdated and not reflecting the new social problems in Bulgaria, and there was a niche for creation of sustainable new jobs connected with delivery of a wide range services to vulnerable groups such as single elderly, disabled, children at risk, marginalized people, etc. ("Social Services and New Employment" [SANE] project).

## **COMPREHENSIVE NARRATIVE**

### **Description of the policy**

In 2006 a determined young woman from Blagoevgrad headed a local scoping project 'Real Support for People in Disadvantaged Situations', which was a part of a pilot project called 'Social Services and New Employment' that was financed by the Ministry of Labour and Social

Policy and the United Nations Development Programme (UNDP) and supported by the Municipality of Blagoevgrad. The local project co-ordinator, Mila Sokolova, described the policy in the following way: 'Unemployed people at pre-retirement age, some of whom were of Roma origin, were invited to be trained as social workers and then they received an assignment as social assistants to elderly people. Thus the problems of two different social groups received simultaneously a positive solution.'

### Background / Origins

The project 'Social Services and New Employment'<sup>3</sup> (SANE project) was conceived in response to the social problems described above as an initiative that combined job creation for unemployed at pre-retirement age with an opportunity for social services delivery to vulnerable people. It was designed following a thorough study of various social practices in Germany, France, and the United Kingdom by experts from UNDP (Sofia) together with experts from the Bulgarian Ministry of Labour and Social Policy. It developed through several stages from pilot projects in four municipalities to a nation-wide policy.

### Policy objectives

The main objective of the project was to pilot and promote a new employment scheme for people at pre-retirement age in exchange for the delivery of social services to vulnerable people. The activities of the project involved: (1) creating a sustainable mechanism at the local level for selection and vocational training of long-term unemployed people and the subsequent generation of long-term jobs for them; (2) expanding the menu of improved social services offered by the social service providers; and (3) improving the social infrastructure connected with delivery of social services. Overall, the project aimed to contribute to the development of a better-targeted long-term national policy concerning the growing number of discouraged unemployed people at pre-retirement age by adopting into practice a sustainable model of social services, decentralized and tailored to clients' needs.

### Chronological development and implementation of the practice

The project has developed through four stages:

1. Elaboration of project design based on a situational analysis. In order to receive more actual representative information, a sociological survey was carried out in May-June 2002 in four Bulgarian municipalities: Blagoevgrad, Botevgrad, Etropole, and Pravetz. It revealed the necessity for targeted interventions in support to people at pre-retirement age. In Botevgrad, the unemployed at pre-retirement age represent 27% of the total number of registered unemployed. For Blagoevgrad, Etropole, and Pravetz the figures are 17%, 16%, and 24% respectively. The survey also highlighted an apparent need for improved social services delivery at the local level.
2. Pilot projects in 4 municipalities (Blagoevgrad, Botevgrad, Etropole, and Pravetz) involving:

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<sup>3</sup> The title of the project, presented in official documents in English is *Social Services against New Employment*, which is a literal but unfaithful translation from Bulgarian. Thus, in this text the project is presented as *Social Services and New Employment*.



- A 'training of trainers' stage;
  - Selection of unemployed people at pre-retirement age (the recent 'statistical portrait' of the unemployed – predominantly women, age 50+, without professional qualifications);
  - Extensive introductory and repeated sustained training of the selected group of the unemployed to qualify them as 'social workers'; and
  - Development of 'home' social services for elderly single people and people with disabilities.
3. Implementation of the project in eight more municipalities.
  4. National implementation of the ideas of the project with the help of a National Program 'Assistants to People with Disabilities', within the framework of 'Social Assistance' activity.<sup>4</sup>

### Agents involved

The policy has been designed and financed by the Ministry of Labour and Social Policy together with UNDP (Sofia). The project's implementation was realized through the joint work of municipalities, municipal social assistance services, regional labour offices, and a number of NGOs that expressed their willingness and readiness to participate in the implementation. In the case of Blagoevgrad, three main agents were involved: the local NGO 'Real Support for People in Disadvantaged Situations'; the Municipality of Blagoevgrad, through the municipal social assistance service; and the Blagoevgrad Employment Office, which provided the project team with information about unemployed pre-retirement people registered at the office and looking for job. As the project was implemented, trainers and experts (psychologists, social workers, doctors, etc.) were also involved.

### Beneficiaries

The beneficiaries were elderly and disabled people who received social assistance, and long-term unemployed people at pre-retirement age. In 2007, the requirement of pre-retirement age was cancelled and the leading principles in the selection of social assistants became their status of being unemployed and their former professional background. This allowed people with more diversified profiles, including more qualified persons, to be accepted and trained within this project.

According to the quarterly reports of the project, in 2005 SANE secured jobs for 751 social assistants and improved the life conditions of 1902 elderly people and people with disabilities living in 147 settlements in the 12 pilot municipalities (March 2006 report). The project secured employment for 58 people from ethnic minorities (36 Roma and 22 of Turkish origin), who accounted for 8.19% of all social assistants. An additional 42 Roma and 45 ethnic Turks benefitted from the project as users of social services in the community. Overall, 5.27% of all project beneficiaries were from ethnic minorities. In 2006, the project gave access to diverse social services to 2045 disadvantaged people, delivered by 708 assistants.

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<sup>4</sup> The program is called 'Assistants...' – in contrast to social *assistance* that is carried out in institutionalized centers for elderly people – because the 'assistants' render their services at homes, and this was something new in Bulgaria.



In Blagoevgrad, about 150 disadvantaged elderly people received monthly social services in their home environment and more than 100 unemployed people at pre-retirement age received permanent employment, contributing for the reduction of poverty in the municipality.

Indirect beneficiaries of the project were the municipalities and the whole system of social services, which was decentralised and made more diversified.

### **Participation processes implemented**

The elaboration of methodology for delivering social services was based on the experiences shared in mixed focus-groups involving the participation of all actors: beneficiaries of the services, social assistants, and social providers and administrators of the services. In Blagoevgrad, members of the local community (for example, young pupils from secondary schools) have been also involved in the project through activities such as celebrating festivities and preparing post-cards and small presents for the elderly single people, etc.

### **Institutionalization processes**

The project was a pilot model for decentralized financing, management, delivery, and monitoring of social services to local communities. It was introduced in 12 municipalities in 2006, and applied at the national level via the national program 'Assistants to People with Disabilities' which has been financed by the Ministry of Labour and Social Policy in 117 municipalities.

Other elements in this institutionalisation process were:

- The methodology for delivering social services has been developed and approved by the National Agency for Social Assistance;
- A roster of all providers of social services (private and public legal entities) has been created;
- An association of NGO providers of social services was established in 2008, initially chaired by Mila Sokolova;
- The profession 'social assistant' has been legally recognized with its inclusion in the National Classification of Professions; and
- An amendment was introduced in the Law of Social Assistance for the decentralised management of social services.

At the local level, the Blagoevgrad project leader, Mila Sokolova, was invited to head the Social Services office at the Municipality of Blagoevgrad.

### **Financing**

The overall implementation cost was U.S.\$7,014,684. Sources were the Ministry of Labour and Social Policy; the pilot municipalities (U.S.\$262,921); the United Nations Development Programme (U.S.\$100,000); and consumers' taxes.

### **Key results and achievements**

The main results of the project have been:

- Strengthening of institutional capacity for financing, managing, delivering, and monitoring social services at national, regional, and municipality levels;
- Introduction of a decentralised model for delivery of social services in communities and the generation of employment; and
- Development of long-term social policy with a double effect: the social inclusion of disadvantaged people and employment for the unemployed.

The project contributed to an improved quality of life for people in need by providing a quality social care and service. At the same time, a partnership was established between non-profit social services providers and the municipalities during what was a new moment in the development of social policy in the cities. The NGO sector in post-socialist countries was practically non-existent before 1989 and partnerships of this kind were a precedent at the time.

The project demonstrated that the decentralized provision of social services can better respond to the real needs of disadvantaged groups. A comparative survey in 22 communities where social services have been delivered by two different providers revealed that users evaluate the services of SANE higher (with 36.7% evaluating as excellent and 40% as very good) than the services delivered by the Program for Assistance of Disabled People (with 18.1% ranking as excellent and 30.5% as very good) (European Institute & Market Links 2007).

### **Main obstacles**

The main challenge faced has been the dialogue with all institutions involved in the project (the Municipality, the Directory for Social Assistance, and the local Employment Office). Even now, when Mila Sokolova is on the other side of the 'barricade' heading the Social Service office at the Municipality, there are still communication problems since there are not enough NGOs with sufficient capacities to deliver social services. The sustainability of the project is another big issue as it needs to be permanently regenerated.

### **Replicability or adaptation of policy elsewhere**

A significant portion of the policy recommendations were incorporated in the approved framework of the integrated program of the Agency for Social Assistance, such as:

- Decentralised management of social services in the community, accompanied by inclusion of representatives of the service providers, social assistants, and users;
- Joint funding by municipal administration, private service providers, and users;
- Introduction of consumer fees;
- Building of local capacity through technical support and training of potential local service providers;
- Professional selection of social assistants and investment in their personal motivation and professional experience;
- Broadening the range of social services and increasing the number of persons receiving services, while maintaining the quality of the services;
- Strengthening the control of the quality of the services at local level through inclusion of all stakeholders; and

- Conducting regular information campaigns for the service providers, potential social assistants, and service users aimed at improving access to services.

All these elements have been introduced into the Bulgarian system of social services based upon the existing experience and good practices in other developed countries. They reflect the social problems of a society in transition from a state-dominated economy to a market economy. However, the trend to tailor the social services according to needs of local communities and of individual clients can be taken as universally applicable.

## SUMMARY

The 'Real Support for People in Disadvantaged Situations' policy of Blagoevgrad, Bulgaria was active from April 2004 to December 2007. Through this policy, pre-retirement people with long-term unemployment, many of whom had low qualifications and some of them of Roma origin, were invited to be trained as social workers and then were assigned as social assistants to elderly single or sick people. Thus, the social problems of two different groups received simultaneously a positive solution. The policy was part of a nation-wide project, SANE (Social Services and New Employment), initiated and designed by the United Nations Development Programme (UNDP) and realized in cooperation with the Bulgarian Ministry of Labour and Social Policy. This was an innovative project which mobilized the resources of local communities and raised the capacity of NGOs as social service providers.

The main objective of the project was to pilot a new employment promotion scheme for people at the pre-retirement age in exchange for the delivery of social services to vulnerable people. Thus, the project aimed to contribute to the social inclusion of vulnerable groups (elderly lonely people and people with disabilities) and to fight unemployment among the least perspective group of people with low or insufficient qualifications at pre-retirement age. The elaboration of the methodology for delivering social services was based on experiences shared in mixed focus-groups involving the participation of all actors: beneficiaries of the services, social assistants, and social providers and administrators of the services. The direct project beneficiaries were elderly and disabled people, who received improved social services, as well as long-term unemployed people at pre-retirement age, who were trained and started new jobs as social assistants.

The project was a pilot model for decentralized financing, management, delivery, and monitoring of social services to local communities. It was introduced initially in 12 municipalities in 2006, and has been applied at the national level via the National Program 'Assistants to People with Disabilities', financed by the Ministry of Labour and Social Policy in 117 municipalities. Other elements in the institutionalisation process were:

- The methodology for delivering social services has been developed and approved by the National Agency for Social Assistance;
- A roster of all providers of social services (private and public legal entities) has been created;
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- The profession 'social assistant' has been legally recognized with its inclusion in the National Classification of Professions; and
- An amendment was introduced in the Law of Social Assistance for the decentralised management of social services.

The overall implementation cost was U.S.\$7,014,684. Sources were the Ministry of Labour and Social Policy; the pilot municipalities (U.S.\$262,921); the United Nations Development Programme (U.S.\$100,000); and consumers' taxes.

The main results of the project have been:

- Strengthening of institutional capacity for financing, managing, delivering, and monitoring social services at national, regional, and municipality levels;
- Introduction of a decentralised model for delivery of social services in communities and the generation of employment; and
- Development of long-term social policy with a double effect: the social inclusion of disadvantaged people and employment for the unemployed.

The main challenge has been the dialogue with all the institutions involved in the project (the Municipality, the Directory for Social Assistance; the local Employment Office). Even now, when Mila Sokolova is heading the Social Service office at the Municipality, there are still communication problems since there are not enough NGOs with sufficient capacities to deliver social services. Another big issue is the sustainability of the project as it needs to be permanently regenerated.

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United Nations Development Programme profile of SANE project:

<http://europeandcis.undp.org/gender/genderandpovertyreduction/show/C2B58CEE-F203-1EE9-B5436EF8EEEC40A2>

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### Relevant national laws and regulations:

- Law on Administrative-territorial Structure of Republic of Bulgaria (LATS RB)
- Local Self-government and Local Administration Act, issued SG N 69/03.08.1999): <http://unpan1.un.org/intradoc/groups/public/documents/untc/unpan016312.pdf>
- National Program for Assistance of People with Disabilities: [http://www.az.government.bg/Projects/Prog/AHU/Frame\\_AHU.htm](http://www.az.government.bg/Projects/Prog/AHU/Frame_AHU.htm)
- Regulations for the application of the Law for Social Assistance, issued SG N133/11.11.1998