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ACTIVE LABOR MARKET POLICY IN BULGARIA AND PARTICIPATION OF THE POPULATION AGED 25-64 IN EDUCATION AND TRAINING

A variety of perspectives for the in-depth study and systematization of trainings within the framework of the Active Labor Market Policy (ALMP) are presented, including formal and non-formal trainings, emphasizing their role as a component in the leading progress indicator in the implementation of the National Strategy for Lifelong Learning (NSLLL) 2014-2020 – “the participation of the population aged 25-64 in education and training”. Proposals for improving the methodical approach for systematizing the formal and non-formal trainings conducted within the framework of the ALMP were formulated as a basis for improving the methodological approach of the reporting system of the Annual Review of the Employment Agency and the Annual Report on the Implementation of the National Strategy for Life Long Learning 2014-2020. This creates a prerequisite for improving the links and interaction between the institutions involved in the ALMP and for ensuring the synergy of their efforts and activities.

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Human capital¹ development and improvement activities are an important part of both the Active Labor Market Policy (ALMP) and the Lifelong Learning Policy. The development of human capital depends on a number of factors, among which a traditional role is assigned to formal education and training (conducted in an organized environment leading to the acquisition of a qualification in the form of a state-recognized document) and to non-formal training, which is organized, but does not include the acquisition of a state-recognized document (CEDEFOP, 2014, p. 37) The main instrument of the ALMP in our country is the National Employment Action Plan, which encompasses initiatives and interventions aimed at “. . . realizing the strategic goals for our country's development in a number of areas, including the National Strategy for Lifelong Learning 2014–2020” (National Action Plan for Employment 2015, p. 2). The need to build and strengthen links and interactions between the ALMP and the LLL Policy is also highlighted in the National Strategy for Lifelong Learning 2014-2020. There, it is stressed that opportunities should be sought for “. . . tracking the

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¹ In the context of the various definitions of human capital, here, this concept is understood as “. . . a set of human abilities through the use of which one achieves an income” (Dulevski, 2010, p. 173).

impact of active labor market policy activities on lifelong learning” (National Action Plan for Employment 2015, p. 2). The results of human capital development activities are monitored in the EU countries by various indicators, the leading place among which is occupied by the participation of the population aged 25-64 in education and training (a 4-week reference period, Labor Force Survey, annual data), which covers both formal education and training and non-formal training (National Strategy for Lifelong Learning 2014-2020, p. 19).

The main objective of this paper is to outline the potential opportunities for improving the methodical approach to systematizing and reporting on formal and non-formal trainings conducted within the framework of the ALMP and emphasizing their role as a component of the leading progress indicator of the LLL Policy- the participation of the population aged 25-64 in education and training. In the course of the study, a number of limitations are perceived, some of which are classified into two main directions:

- The ALMP covers a variety of categories of activities – training, subsidized employment, direct job creation, incentives to start a business, etc. (Martin, 2014, p. 6). All these aspects and categories have their cognitive significance for a deeper understanding and more efficient management of ALMP-related processes. In the context of the objectives of this paper, trainings within the ALMP are considered here, while other categories are only mentioned if necessary.

- The trainings organized and conducted within the framework of the ALMP are seen as an important component of the activities in different socio-economic areas – developing and improving people's competencies for effective work, activating the inactive population, enhancing the qualities of human capital, raising the quality of employment, etc. The article focuses on formal and non-formal learning conducted within the framework of the ALMP and highlights their role as a component of the leading indicator of LLL Policy progress – the participation of the population aged 25-64 in education and training.

The present paper uses a variety of research methods, including the systematization of the results of surveys in this field (desk-research) and the study of related legal and management (strategic, methodological, planning and reporting) documents. A detailed statistical analysis of the status and dynamics of the studied process based on data from the traditional information sources – the Labor Force Survey (LFS), the Adult Education Survey (AES) and the Continuing Vocational Training Survey (CVTS) – is outside the scope of this paper. In order to achieve the objectives of the survey, the data used are taken mainly from: the Annual Employment Agency Review, the Annual Reports on the Implementation of the National Employment Action Plan, the Annual Reports on the Implementation of the National Strategy for Lifelong Learning 2014-2020, the Annual Implementation Plans of the National Strategy for Lifelong Learning 2014-2020 and the Labor Market Policy Monitoring of Eurostat. Over the last decades, the ALMP activities have accumulated a relatively rich information base, but due to the limited volume of the present exposition, this paper focuses mainly on the post-2010 period.

Systematization of trainings within the framework of the ALMP

The ALMP benefits the development of human capital in a number of directions: as a result of the training, people's knowledge and skills are built and perfected as a prerequisite for successful employment; work skills and opportunities for improving the work experience are maintained through subsidized employment; insured earnings during training and subsidized employment provide the opportunity to support the living standard of the most vulnerable social groups in the labor market and to maintain the labor skills of the long-term unemployed. The ALMP is accompanied by the spending of financial resources (from the state budget and from the OP "Human Resources Development"). The ALMP is the subject of periodic evaluations, which ". . . are increasingly becoming an integral part of the implementation of the overall employment policy. . . . These assessments . . . of different aspects (programs and measures) of the active labor market policy on a national or regional level are useful correctives for the policy pursued and contribute to it becoming more flexible in nature, they change in line with the dynamics of the economic development and respond more adequately to the needs of the practice" (Beleva, 2017, p. 8).

Data on the labor market policy are published annually in the EU countries. There are activities that are defined as "public labor market interventions in order to increase its effective functioning and correct imbalances and . . . which are targeted towards certain groups in the labor market" (Eurostat, 2013, p. 7). The costs of various interventions are classified into several categories, which can be seen in Table 1.

Table 1

Main categories of labor market policy expenditure, observed in the EU countries

Expenditure categories	Description
1. Labour market services	Expenditures for the services and activities of the public/national employment services (the Employment Agency in Bulgaria) – labor market interventions, where the main activity of the participants is related to job search and usually does not lead to a change in the status of the labor market.
2. Training	Includes interventions to provide temporary support to disadvantaged groups in the labor market in order to "activate" the unemployed, to help people move from forced inactivity to employment, or to help preserve the work of people at risk of unemployment.
3. Employment incentives (this group also includes rotation and job sharing initiatives)	
4. Sheltered and supported employment and rehabilitation	
5. Direct job creation	
6. Start-up incentives	
7. Out-of-work income maintenance and support (in case of dismissal and job search support)	Includes financial aid to compensate individuals for salary loss, to provide support for job search, to facilitate early retirement.
8. Early retirement	

Source: Eurostat (2013). Labor market policy statistics – Methodology.

The Employment Promotion Act and the Rules for its application regulate the basic obligations and rights of the institutions in the field of the planning, organization

and reporting of the employment and training policy. The Annual Employment Agency Reviews show that there is spending on the ALMP from both the state budget and the funds of the Operational Program “Human Resources Development” (OP HRD) (Table 2).

Table 2

Key ALMP data in Bulgaria for the period 2010-2016

	2010	2011	2012	2013	2014	2015	2016
Total cost for ALMP (in thousands BGN)	97 354.9	127 389.3	220 459.6	394726.0	212 137.4	128 780.7	133 696.6
-including from the state budget	63 281.5	54 180.0	61 021.7	84 208.2	81 723.3	58 766	62 024.7
- including from the OP HRD	34 073.3	73 209.3	159 437.9	310 517.8	130 414.2	70 014.7	71 671.9
Total number of involved persons	139 360	141 740	179 460	172 389	122 080	65 502	54 789
Unemployed persons enrolled in training	20 556	20 710	54 787	30 737	31 694	25 609	16 641*
Unemployed persons involved in employment	53 070	68 999	84 468	83 693	67 696	29 159**	38 148
Total number of persons enrolled in training	80 102	72 741	91 862	87 324	52 773	27 357	16 641*
Employed persons enrolled in training	59 546	52 031	37 075	56 587	21 079	1748***	not in trainings

*The report includes the OP HRD schemes to which the Employment Agency is a specific beneficiary. This does not include schemes where the social partners and the Executive Agency “General Labor Inspectorate” are the beneficiaries.

** The 106 persons from the Entrepreneurship Program are not included.

***The 10 895 employed in the scheme “Services for the development of a flexible labor market” are not included.

Source: Annual Employment Agency Reviews – 2010-2016. The data are comparable with the data from 2010, <http://www.az.government.bg/>

Within the framework of the ALMP, trainings occupy a significant place and are systematized according to the Eurostat methodology for the annual monitoring of employment policies in the following groups (Eurostat, 2013, p. 15-16):

- *Institutional training* – training, where over 75% of the time is spent in the training institution – school, college, training center or similar organizations. Distance learning (including e-learning) is considered as a sub-category of institutional training when it is financed by public funds, aimed at improving the employability of the target groups, monitoring/supervision is provided and is implemented not sporadically, but at least periodically/part-time.

- *Workplace training* – training, where over 75% of the time is spent in the workplace.

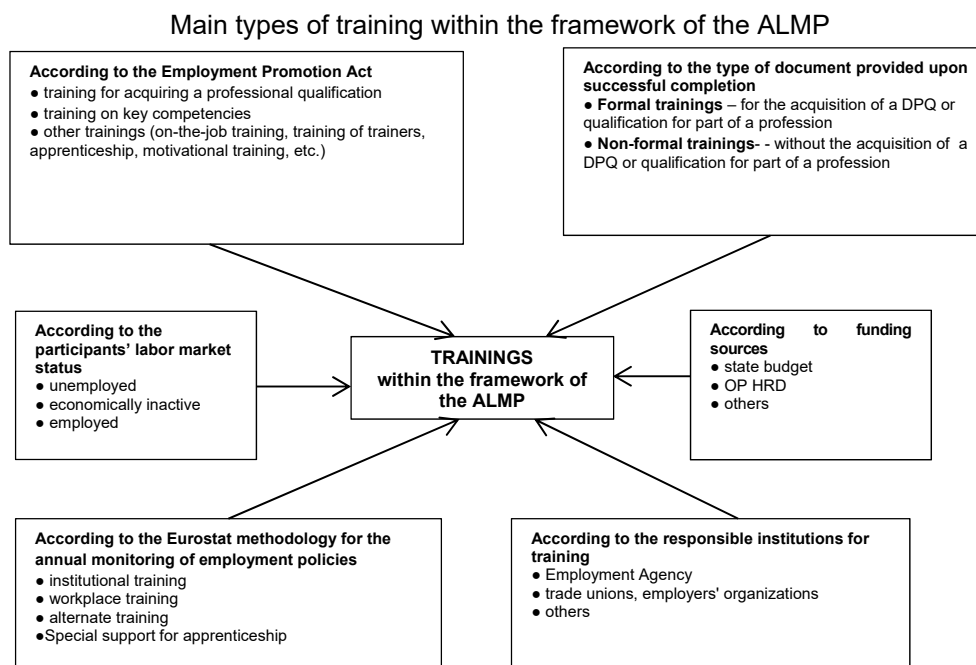
- *Alternate training* – the learning time is a combination of time spent in a learning institution and time spent at the workplace.

- Special support for apprenticeship – is achieved through creating incentives for employers to recruit apprentices and through allowances/training allowances for certain vulnerable groups. For the purposes of the Eurostat methodology, a number of methodological details are defined on how to appraise apprenticeships and internships according to their specific parameters.

Each year the Ministry of Labor and Social Policy (MLSP) provides information for the purposes of the Eurostat database, with all programs and measures under the Employment Promotion Act and the OP HRD schemes indicating the number of unemployed and employed persons in training, including in vocational training and apprenticeship. According to Eurostat data for 2016, 29 310 people are involved in training and 26 477 people have completed their training (Eurostat, 2016).

The activities of planning, organizing, conducting, monitoring and reporting on the ALMP trainings are characterized by a variety of perspectives, which is a prerequisite for different approaches to the classification of the trainings (see the Scheme).

Scheme



This scheme outlines six main features of systematizing and classifying trainings that take place within the framework of the ALMP:

- according to the sources of funding: state budget, OP HRD and others;
- according to the institutions responsible for their implementation: the Employment Agency (EA) and other institutions;
- according to the labor market status of the main groups of participants (unemployed, employed and economically inactive), including various structural aspects, such as the age of the participants, with a special focus on youth and high age groups in the context of the current and projected dynamics of the economic activity of these population groups (Borisova-Marinova, 2014);

- according to the basic types of trainings regulated by the National Employment Act – training for the acquisition of a professional qualification; training on key competencies; other: on-the-job training, training of trainers, apprenticeship, motivational training, etc.;

- according to the Eurostat methodology for the annual monitoring of employment policies: institutional training; workplace training; alternate training; special support for apprenticeship;

- according to the type of document that is provided upon their successful completion:

- formal trainings – include the acquisition of a degree of professional qualification (DPQ) or qualification for part of a profession;

- non-formal trainings – do not include the acquisition of a degree of professional qualification (DPQ) or qualification for part of a profession (examples of trainings in this group are: key competencies training, internship, workplace training, apprenticeship, training of trainers, etc.).

In the Annual action plan for 2017 on the implementation of the NSLLL (Impact area 5), large-scale activities are carried out within the framework of the ALMP and the institutions responsible for them are the Ministry of Labor and Social Policy, the Employment Agency and the social partners.

Annual action plan for 2017 on the implementation of the NSLLL
(texts from Impact area 5)

Impact area 5: Increasing the attractiveness and improving the quality of vocational education and training in order to ensure employment and competitiveness

5.8.1. Identification of economically inactive young people aged up to 29 years, including those who are not currently in education or training and are not employed; their “activation” for inclusion in the labor market, including through training to acquire professional qualification in connection with subsequent employment after training

5.8.2. Providing vouchers for the training of unemployed youths aged up to 29 years to acquire professional qualifications and/or training for the acquisition of key competencies in connection with subsequent employment; OP HRD 2014-2020

5.8.4. Training of unemployed and inactive people to acquire vocational skills and key competencies and providing them with subsequent employment; OP HRD 2014-2020

5.8.5. Training of employees to acquire professional qualification and key competencies; OP HRD 2014-2020

5.8.6. Training for vocational qualifications and key competences of economically inactive people, people with disabilities, carers of dependent family members; OP HRD 2014-2020

5.8.7. Training for the acquisition of vocational qualification of disabled persons and other disadvantaged persons employed in social enterprises; OP HRD 2014-2020

5.8.10. Involvement of inactive, unemployed and employed persons in specific training for specific jobs; OP HRD 2014-2020

5.8.11. Training of unemployed people with low education; OP HRD 2014-2020

In 2018, the “New Workplace” Scheme continues to be implemented, providing adequate training for the persons, including training at the workplace. Under the “New chance for success” project under the “Literacy of adults – Phase 1” procedure, which is part of the “Science and education for smart growth 2015-2020” Operational Program, persons without completed stages and levels of education, unemployed persons and illiterate persons are included in courses for literacy or in competency courses at the lower secondary level of primary education. Persons who successfully complete their training will be included in vocational training under the project “Training of adults who have undergone literacy courses”, financed under the OP HRD, and will be helped to start work. Employees will be provided with training to acquire professional qualifications or key competencies. Flexible opportunities will be provided for combining training and employment in enterprises with variable activity intensities during different periods of the year. Thus, in periods of lower employment, employers will be able to provide training for their employees in order for them to acquire the skills and key competencies needed to fulfill their work obligations, which will be subsequently applied during the active season.

The briefly presented varied trainings (key competency courses, internships, motivation training, apprenticeships, workplace training, etc.) conducted within the framework of the ALMP², in the context of the present study goals, are considered as a set of formal and non-formal trainings, and the next part of this paper highlights a number of methodological aspects of their monitoring and reporting.

The methodological aspects of reporting trainings within the framework of the ALMP

The trainings conducted within the framework of the ALMP are reported publicly in a special section of the Annual Employment Agency Review. In accordance with the internal organizational normative basis, the EA has obligations to: organize and process the data on the ALMP; perform periodic observations and evaluations of the programs and measures for training and employment and adult education; carry out annual analyses and reviews.³ At the same time, trainings organized within the framework of the ALMP are a significant part of the lifelong learning activities and data for these trainings are also presented in the Annual reports on the implementation of the national strategy for lifelong learning (Impact area “Increasing the attractiveness and improving the quality of vocational education and training to ensure employment and competitiveness” and Impact area “Development of opportunities for non-formal and informal learning for personal and professional progress. New opportunities for good quality of life following the working career’s end”).⁴ In this context, the trainings organized and conducted within the framework of the ALMP are presented as an important component of the

² Employment Promotion Act, Chapter Seven, Section I “Adult Education”

³ Rules of the Employment Agency - Art.12 (p.4, 10, 11).

⁴ Annual Report on the Implementation of the NSLLL 2014-2020, 2016, p.74 and p. 82

activities for achieving the high goals set in the NSLLL. The progress on these goals is being monitored through a complex system of indicators, and the leading position amongst them is held by the “participation of the population aged 25-64 in education and training” indicator.

In recent years, specialized surveys have consistently commented on Bulgaria's low performance (compared to the average for European countries) in terms of the strategic indicator “participation of the population aged 25-64 in education and training” (a 4-week reference period, Labor Force Survey, annual data) for the implementation of the NSLLL (Beleva, 2015, p. 8). By its nature, this indicator covers participations in both the traditional education system (where the participants acquire officially recognized degrees of education and training under the Higher Education Act, the Pre-school and School Education Act, and the Vocational Education and Training Act) and in various other organized activities (called non-formal trainings) for improving the participants' knowledge and skills, which do not lead to the acquisition of an officially recognized degree in the country⁵. This indicator's heterogeneity (covering both formal and non-formal learning) should be taken into account and opportunities should be sought to improve its monitoring and reporting (Atanassova, 2016). Figures for the past five years show a slow growth rate from 1.7% in 2012, rising to 2.2% in 2016, while the average level for the EU countries in 2016 was 10.8%. The achieved growth does not significantly change the position of Bulgaria in the ranking. At this level, we are still far from the strategic goal – to reach a 5% value for this indicator in 2020 (Beleva, 2016; Atanassova, 2015).

The methodology for monitoring the participation in education and training of the population aged 25-64 clearly outlines the requirements, which are assigned to the non-formal trainings category, by systematizing the non-formal trainings into several groups. According to the instructions in the Labor Force Survey, “non-formal learning is defined as training organized in the form of a course, conference, seminar . . . or any other form, regardless of whether it relates to the person's current job, their future work, or is a general interest – for personal, social or domestic purposes. Non-formal learning is done with the direct participation of a tutor (lecturer, trainer, or instructor). Examples of non-formal training are also instructions (briefings) with the support of . . . an instructor.” (Instructions for filling out the Labor Force Survey Questionnaire, 2016).

In this respect, it is necessary to consider the activities in the organized training programs for work-place training, mentoring and apprenticeship (when they do not include the acquisition of a DPQ or part of a professional qualification) and to emphasize that in these programs there is a responsible person who acts as a lecturer/instructor. In the programs for workplace-training and apprenticeship, the learning process is built on the concept of providing external subjective support to the trainee. This means that ALMP-funded programs for workplace training, mentoring and

⁵ Non-formal trainings are characterized by the presence of a teacher, lecturer or instructor (see NSI, 2016. Surveillance methodology...).

apprenticeship and others (when they do not include the acquisition of a DPQ) are non-formal trainings. This should be taken into account when monitoring and reporting these training activities. Within the framework of the ALMP, such types of non-formal training are planned, organized and funded, which are not in the traditional course format but have the essential characteristics of non-formal trainings. In the LLL reporting documents, these activities are reported in a special section (“Development of opportunities for non-formal and informal learning for personal and professional progress. New opportunities for good quality of life following the working career’s end”) where it is necessary to present systematized data on non-formal trainings (on-the-job training, key competencies training, etc.) organized within the framework of the ALMP – by both the Employment Agency and the social partners, and others.

In summary, it can be concluded that the trainings conducted within the framework of the ALMP should be viewed as a set of formal and non-formal trainings, which are an important component of the efforts to increase the participation rate of the population aged 25-64 in education and training.

On the basis of this analysis, concrete proposals are formulated to improve the methodical approach to organizing the data on trainings within the framework of the ALMP, in order to provide information on the participants in formal and non-formal trainings in the annual database as well. These proposals relate to the data structuring in the Annual Employment Agency Reviews, which will also affect the relevant sections of the Annual Reports on the Implementation of the National Strategy for Lifelong Learning.

Large-scale training activities within the framework of the ALMP are reported annually in the Annual Employment Agency Reviews by providing systematic data in a variety of sections for the main groups: the unemployed, the employed, the inactive, the vulnerable groups in the labor market, etc. A certain part of the trainings conducted within the framework of the ALMP are also reported in the Annual Reports on the Implementation of the National Strategy for Lifelong Learning⁶, where the systematization of trainings (formal and non-formal training) according to the type of document, obtained upon their successful completion is of primary importance. These activities are typically reported in the sections “Increasing the attractiveness and improving the quality of vocational education and training to ensure employment and competitiveness” and “Development of opportunities for non-formal and informal learning for personal and professional progress. New opportunities for good quality of life following the working career’s end”. Currently, the reports on these sections are presented through the terminology/classifications used in the Annual Employment Agency Reviews and the systematized data on participants (based on the labor market status) in a variety of areas: apprenticeship programs, on-the-job training, motivation training, voucher training, key competency training, etc. In the context of the NSLLL goals, it is necessary to present another important aspect of the ALMP trainings as formal (training, including the acquisition of a DPQ or part of a

⁶ Annual Report on the Implementation of the NSLLL 2014-2020 (for 2014 and 2015, respectively).

professional qualification) and non-formal training. The non-formal training group covers a variety of training interventions, organized and funded under the ALMP. Some of them are in the traditional course format, which is more accessible for reporting – for example: competence courses, training courses for trainers, motivation courses, etc. Another part of the non-formal training initiatives funded by the ALMP do not have the traditional course format but are instead other forms of non-formal training – on-the-job training, apprenticeships, etc. In this context, it is necessary to systematize the trainings within the framework of the ALMP (along with the various aspects of the data structuring) according to the type of the document, which is provided upon their successful completion. Training participants are grouped into two main categories – participants in formal trainings (including the acquisition of a DPQ or part of a professional qualification) and participants in non-formal trainings. This will increase the analytical potential of the data on the persons enrolled in ALMP trainings as a part of the Annual Employment Agency Reviews.

In the process of the systematization of the trainings in these two groups (formal and non-formal learning), it is possible to come across difficulties in providing information on the two groups (formal and non-formal learning), some of which are highlighted in this paper. It is relatively easy to separate the formal ALMP trainings, which include the acquisition of a DPQ or part of a professional qualification, into a group. At the same time, there are some potential difficulties in grouping and encompassing the various forms of non-formal ALMP trainings, which in this case are systematized in two categories: non-formal trainings in the traditional course format (competence courses, training courses for trainers, motivation courses, etc.) and training initiatives that do not have the traditional course format but meet the requirements for non-formal learning (according to Eurostat's Labor Force Survey methodology) – they have an organized nature and a person performing the role of instructor/trainer. The latter group includes: apprenticeship programs (that do not include the acquisition of a DPQ), on-the-job training, etc. In this sense, it will be useful to annually prepare a list of the types of adult training within the framework of the ALMP that are part of the non-formal training.

For the purpose of obtaining additional information on training in the workplace, it is appropriate to take into account the identification number of labor contracts concluded under Art. 230 of the Labor Code – these are employment contracts with a condition of on-the-job training and the employer is obligated to train the employee in the process of work in a particular profession or specialty. In practice, the information is contained within the notifications submitted under Art. 62 Para 5 of the Labor Code upon the registration of labor contracts. Contracts under Art. 233b of the Labor Code are concluded for apprenticeship with a person aged up to 29 years, graduating from secondary or higher education without professional experience and they also contain information on on-the-job training⁷. The information

⁷ The contract specifies the way and the form by which the practical skills are acquired in the process of performing the duties, the name and the position of the mentor, the duration of the contract, which cannot

on training through work (the dual training system), which is organized in accordance with the Vocational Education and Training Act, but includes unemployed persons, who are subsidized under the Employment Promotion Act, can also enrich the data about the trainings conducted within the framework of the ALMP.

The other group of difficulties in collecting this data is related to the institutional diversity of the beneficiaries of the ALMP programs and measures – along with the Employment Agency, a certain part of the activities are carried out by trade unions, employers' organizations and others. Ensuring a unified approach to collecting and systematizing reporting information on ALMP trainings (provided by the Employment Agency and the structural units of trade unions, employers' organizations, etc.) requires additional efforts, which may also complicate the coordination of the monitoring and reporting of the relevant data on formal and non-formal ALMP trainings.

The presented potential difficulties for a fuller account of the formal and non-formal ALMP trainings can be overcome – especially given the benefits of the proposed change in the organization of the reporting information. The availability of specific data on the participants in formal and non-formal ALMP trainings will provide a clearer picture of the role of ALMPs in achieving the objectives of the key areas of the NSLLL. The availability of this data on the participants in formal and non-formal trainings will provide the opportunity to systematize the necessary information on the relevant sections of the annual reports on the implementation of the National Strategy for Lifelong Learning 2014-2020 for the activities carried out in the Impact area “Increasing the attractiveness and improving the quality of vocational education and training to ensure employment and competitiveness” and the Impact area “Development of opportunities for non-formal and informal learning for personal and professional progress. New opportunities for good quality of life following the working career’s end”, where the data will be presented for both the formal trainings and the non-formal trainings conducted within the framework of the ALMP.

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The submitted proposals for improving the methodological approach towards the systematization and reporting of ALMP trainings can generate a series of discussions and even negative reactions in relation to the potential difficulties in their practical application. At the same time, it is necessary to take into account the many positive effects from the practical application of the proposals made, which create prerequisites for:

- improving the links and interaction between the institutions involved in the ALMP process and ensuring the synergy of their efforts and activities;
- increasing the analytical potential of the reported data for the training activity carried out within the framework of the ALMP;

be less than 6 months and cannot be more than 12 months, as well as other conditions related to the traineeship. The employer issues the trainee a recommendation certifying the learning outcomes to serve him/her when applying for employment with another employer.

- identifying the specific benefits of ALMP trainings as a means of developing human capital and increasing the capacities of people on the labor market for sustainable employment and successful professional realization.

The submitted proposals do not claim exhaustiveness but they are an appropriate starting point for searching for and finding rational solutions to strengthen the coordination of key stakeholders in the complex processes of developing and improving people's competences through the ALMP and highlighting its role in achieving higher levels of the leading indicator of the lifelong learning policy – “the participation of the population aged 25-64 in education and training”.

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