

**THE REFORM OF VOCATIONAL EDUCATION AND
TRAINING IN BULGARIA**

**THE IMPACT OF RECENT INNOVATIONS IN
TEACHING AND LEARNING**

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School of Continuing Education

DEDICATION

I dedicate this work to my Mum and Dad. I wish they could have been here to share and enjoy this moment. Thank you both for everything you did.

I also dedicate this work to my wife Sue, and children Lucy, Jonathan and Katy, for their patience and understanding

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DECLARATION

I declare that the work referred to in this Thesis has not been submitted in the same or a different form in support of an application for another degree or qualification, of this or any other university, or other institution of learning.

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ABSTRACT

Much has been written over recent years questioning the value of exporting systems of VET from developed countries and expecting them to meet the needs and demands of developing countries. Most recently, the main recipients of development aid, particularly from the EU, have been the countries of the former 'eastern bloc'. As a consultant working on an EU project to upgrade VET in Bulgaria, the author was involved in delivering staff development seminars concentrating on 'new' teaching and learning strategies to teachers within the secondary vocational sector. Although the staff development was well received at the time, questions were raised about whether such fundamental changes in approach, from a very authoritarian and didactic approach, to an approach that is student-centred, could be sustained on the basis of a series of seminars. This thesis examines what impact these seminars have had in promoting the use of the 'new' strategies. In particular, the author examines to what extent cultural and / or contextual factors have played a role in the effectiveness of implementation of the 'new' student-centred teaching and learning strategies.

GLOSSARY AND LIST OF ABBREVIATIONS AND ACRONYMS

APA	American Psychological Association
ASA	American Sociological Association
BAICE	British Association of International and Comparative Education
BC	British Council
BCP	Bulgarian Communist Party
BG	Bulgaria
BSA	British Sociological Association
BSECZ	Black Sea Economic Co-operation Zone
BSP	Bulgarian Socialist Party
BTI	British Training International
CBMT	Competency Based Modular Training
CBT	Competency Based Training
CEE	Central and Eastern Europe
CEFTA	Central European Trade Agreement
CIA	Central Intelligence Agency
COMECON	Council For Mutual Economic Assistance
DFID	Department for International Development
DTI	Department of Trade and Industry
ECA	East and Central Asia
ETF	European Training Foundation
EU	European Union
FAS	Foras Aiseanna Saothair (The Irish National Training and Employment Authority)
FCO	Foreign and Commonwealth Office
FE	Further Education
FLT	Foreign Language Training
GDP	Gross Domestic Product
HE	Higher Education
HRDC	Human Resources Development Unit
ICHR	International Commission for Human Rights
ICT	Information and Communication Technology

ILO	International Labour Organisation
IMF	International Monetary Fund
MES	Ministry of Education
MEST	Ministry of Education Science and Technology
NATO	North Atlantic Treaty Organisation
NAVET	National Agency for Vocational Education and Training
NCVQ	National Council for Vocational Qualifications
NVQ	National Vocational Qualification
OECD	Organisation for Economic Co-operation and Development
PCE	Post Compulsory Education
PHARE	The EU organisation to assist applicant countries of Central Europe in preparation for accession to the EU
PMU	Project Management Unit
QCA	Qualification and Curriculum Authority
SCAA	Scottish Council for Academic Awards
SCOTVEC	Scottish Vocational Education Council
SFOR	Stabilization Force
TAP	Technical Assistance Personnel
TCP	Teachers Career Path
TOPS	Training Opportunities
TOR	Terms of Reference
UDF	Union of Democratic Forces
UtDF	United Democratic Forces
UK	United Kingdom
UN	United Nations
UNDP	United Nations Development Project
USA	United States of America
USSR	Union of Soviet Socialist Republics
UVET	Upgrading Vocational Education and Training
VET	Vocational Education and Training
VETEREST	Vocational Education and Training; Education, Research and Technology
YOPS	Youth Opportunities

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CHAPTER 1

INTRODUCTION

Since the late 1980's and early 1990's and the fall of Communism across Central and Eastern Europe (CEE), the countries of the former 'Eastern bloc' have been gradually struggling to come to terms with the problems associated with economic reform, and Bulgaria is no exception (Hall, 1998). The donor community has more or less 'demanded' such reforms, in return for wide-ranging aid packages (King, 1991; Psacharopoulos & Woodhall, 1997; Vachudova, 1997; Shaw, 1997; Nielsen, 1999). The continuing struggle to transform from ponderous, centrally controlled economies to free, market-led economies has not been easy for these countries, and it continues to be problematic (DfID, 1999). However, one of the key motivating factors and benefits of transition seen by the countries of CEE, is accession to the European Union (EU). Accession, however, is conditional upon adopting measures leading to compliance, or at least 'harmonization' with EU standards and legislation across a wide range of areas, including vocational education and training (VET) (EU, 1998). As far as education and training programmes are concerned however, the underlying principle is now seen to be that of 'mutual trust' (ETF, 1999b). This, effectively, forms the background of this study - factors associated with the reform of VET in CEE. The main focus of the study is VET reform in Bulgaria, and in particular, the impact of 'new' teaching and learning strategies within a new modular framework based upon the competency model.

?

Until the mid 1990's, Bulgaria, along with other countries of CEE, found itself in what could only be described as an absurd predicament regarding economic and political reform. Aid from the countries of the Organisation for Economic Co-operation and Development (OECD), designed to assist the democratization process, was being denied because the process of reform in the country was not yet adequate (Tchukov, 1990). By 1996, although reforms continued to lack significant progress, aid from the West was more forthcoming. Few people would disagree that one of the key factors that underpins any successful economy is a sound educational policy. However, the most important component of this is an effective education and

training system (Bennel & Pearce 1998; ETF 1999a; Fluitman 1998). Clearly, therefore, educational reform must be at the heart of any wider reforms. It should be no surprise therefore, to find that the EU sees VET reform as a key pre-requisite[?] for aspiring membership to the EU (EU, 1998; DfID, 1999).

Amongst the wide-ranging reforms required to underpin the democratisation process, as pointed out above, education was seen as a key target area, in particular VET (ETF, 1999a; Nielsen, 1999). In order to support these reforms, the EU provides assistance under its PHARE¹ programmes of aid to the countries of CEE. It was through PHARE that the EU, assisted by the European Training Foundation (ETF), began a project providing support to Bulgaria for the upgrading of its vocational education and training system in late 1996. It was under this programme that the author became involved as an educational consultant for vocational education reform in Bulgaria.

The author, who worked previously in the Construction Industry, has been involved in vocational teacher training for over a decade. Essentially, this has involved him in preparing vocational professionals, practitioners and specialists, for careers in teaching their specialist subjects. Throughout this time, in addition to this work, he has also worked as a consultant on a number of overseas development projects on vocational teacher training and general staff development. It is precisely because of these experiences on such projects, that the author was acutely aware of the possible problems that can be encountered in relation to undertaking this kind of work, particularly in relation to contextual and cultural issues.

The programme, Upgrading Vocational Education and Training (UVET), comprised a number of strands, including curriculum development and aspects of educational management. The author's involvement, however, was in the 'training of trainers' element of the programme and this is the focus of this study. Specifically, the author's main role was in delivering staff development seminars to staff working within the VET

¹ The European Union's PHARE programme operates between member states of the EU and the former communist countries of Central and Eastern Europe. It is aimed at supporting economic restructuring and democratic reform. Aid is available in the form of provision of policy advice, consultancy and training in all areas needed in a democratic and market economy.

sector on 'new teaching and learning strategies'. Essentially, this work focused upon student centred learning in relation to the development of modular and competency-based training. Alongside this programme of staff development was a comprehensive programme of curriculum development in which subject specialists in a number of different vocational occupations, from the UK and the Republic of Ireland, helped counterpart staff in Bulgaria to develop and upgrade their specialist curriculum along competency lines.

The UVET programme was run and managed by a consortium comprising: The British Council; FAS International Consulting Limited (FAS), from the Republic of Ireland; The National Council for Vocational Qualifications (NCVQ); and The Scottish Vocational Education Council (SCOTVEC)². These latter two organisations, under their new names (see footnote), are heavily involved in promoting their respective qualifications, systems and expertise overseas. The rapid globalisation of the economy this past decade has only served to accelerate this trend, with overseas markets being targeted even more (Bennel & Pearce, 1998). The British Government, for example, in 1998, established British Training International (BTI) with the specific brief to sell British VET overseas, the main product being the competency-based National Vocational Qualifications (NVQ).

The emerging model of training

Whilst the author's role was mainly concerned with 'new teaching and learning strategies', he was also involved in staff development in the area of modular design – both of which can be seen to be closely related to competency-based VET. Given the background and experience of the curriculum development consultants, and the long term objectives of:

“Updating the curriculum in a number of vocational areas, in line with EU standards following a modular competency-based format.” (UVET Consultants Guide, July 1997 p10)

² These two organisations have since been absorbed by, the Qualifications and Curriculum Authority (QCA) and the Scottish Council for Academic Awards (SCAA) respectively.

The emerging model of training in the specialisms identified in the programme was likely to reflect the NVQ approach.

This raises a number of serious issues. As King observes:

" There is no single version of best practice. External agencies will need to be cautious about providing universal prescriptions." (King, 1993 p201)

At a strategic level, it raises the distinct possibility of a repeat of what could be described as the ' colonial experience ' of imposing often inappropriate values and approaches to education and training, without sufficient account being taken of the wider cultural context related to implementation (Thomas, 1990; Banya, 1993; Dore, 1994; Smith, 1995; Garret, 1999; Parkes et al 1999). At an implementation level, such developments could have equally problematic outcomes. To a nation apparently steeped in the 'work-ethic' associated with central dominance and control, which at the classroom level effectively translates into strict teacher control, any 'new teaching and learning strategies' based on 'student-centredness' could be seen as anathema to those involved. Indeed, with the emphasis on *learning* rather than *teaching*, it creates an immediate shift in the responsibility of the whole process, from teacher to student, with a corresponding shift in the role of the teacher (Smith in Muckle and Morgan, 2001).

This research seeks to explore some of the key issues involved when accepted approaches to teaching and learning in one country, the UK, are transferred to another country, Bulgaria. Not only can it be argued that Bulgaria has a culture very different from that of the UK, but its recent historical and political development led to a system that, in the author's experience, has difficulty in actually recognising the difference between the very concepts of 'teaching' and of 'learning'³. Dore (1994) provides a thought provoking account of the dangers associated with 'educational exports and experts...':

³ Whilst it could be argued that this is simply a reflection of the situation prior to the wholesale adoption of humanist approaches to learning in Northern countries, the semantics involved also proved to be problematic initially. During the early days of the seminars, much discussion took place with the translators to ensure a correct form of words was used to distinguish between the two concepts because in Bulgaria, the same word is often used for both 'teaching' and 'learning'(see footnote on page 59).

“ From educational departments, curriculum experts went all over the world spreading the gospel of Nuffield science and child-centred learning.” (Dore, 1994 p13)

During the life of the ‘training of the trainers’ aspect of the project, which commenced in March 1997 and effectively came to a close in May of 1999, there was no question that individual teachers were ready and willing to accept many of the approaches and strategies presented to them during the series of seminars in Bulgaria. The response from both teachers and Ministry representatives was overwhelmingly positive, even taking into account the ‘politeness factor’. The motivation, and often excitement at the prospect of implementing such approaches was tangible. Despite such enthusiasm however, questions were already being asked by the consultants about the infrastructure and political will required to sustain support for the implementation of the programme of reform when the UVET project itself came to a close.

In May 1999, the author was asked to return to Bulgaria to deliver further staff development on approaches to assessment. He decided to try and use this opportunity to gather some preliminary data about issues related to the implementation and sustainability of some of the ‘new’ approaches that had been introduced as part of the programme. It was hoped that such data might provide an indication as to whether context or culture might mitigate against the medium to long-term success of the programme. Whilst the author’s planned approach to the research was always to return to the country after a suitable period had elapsed, to carry out fieldwork to assess the impact of the programme, he also thought that some initial data gathering might provide some direction to the planned fieldwork.

Details regarding the preliminary data gathering exercise are given in Chapter Five, but a number of key ‘themes’ were identified as a result of findings from a questionnaire distributed during the staff development seminars. In terms of the general reforms regarding the introduction of new curricula along modular competency lines, the majority of respondents found that:

- the existing curriculum was already meeting industry’s needs and required no major reform

- the existing curriculum provided a better balance of theory and practical components than the new curriculum
- the existing grading approach to assessment was more effective than the competency 'competent/not yet competent' approach
- the lack of finance/resources/infrastructure would provide a major barrier to reform

In relation to the staff development the majority found that:

- they had already tried to implement some of the 'new' teaching and learning strategies
- the seminars were very good for many reasons including exchange of ideas with colleagues from home and abroad, for the active learning content etc.
- they required further staff development

Interestingly, as can be seen from the above responses, there are a number of fundamental contradictions here. Although most respondents initially thought that their existing system was best suited to their needs, they were nevertheless open to new ideas. Respondents did however, think that the most distinctive features of their traditional system could be maintained after reforms. These contradictions were partly explained during the seminar feedback. It was clear from the feedback, both formal and informal, that staff were willing and ready to adopt the reforms, although they were also keen to preserve, if possible, some of the strongest aspects of their traditional system. Delegates' enthusiasm for the new methods was tempered by the relative conservatism and reluctance by some to move *too* quickly from their traditional and familiar approaches. In a distinct example of the conflicts exposed in countries going through the transition from autocracy to democracy, there was more than a hint of a suggestion that Ministerial conservatism might provide a barrier to the progress desired by the staff working within the system. Ministry 'experts' and representatives were in attendance during all the initial seminars, communicating back to the Ministry on proceedings. During the very early days, this occasionally appeared to have an effect on how some delegates responded in terms of fully engaging in discussions and on how they approached the set tasks and activities.

What had already become clear, much earlier, was that little, if any formal teacher training had been undertaken by most of the participants attending the seminars. Although the targeted training delivered during such seminars has many benefits, it can be short-lived. Indeed this is one of the questions the research will also address. The wider issue is, whether the Ministry should establish a formal entry route for vocational teachers, involving a comprehensive course of teacher training in which the content of recent staff development seminars are embedded. The consultants recommended this after the first round of seminars.

The very nature of vocational teacher training in Bulgaria can be seen to be fundamental to the longer-term sustainability of the project. The MES recognise this and go so far as to state that:

“ The performance of teachers is the single most important factor in the education and training of students.” (MES VET Policy Document, 1999b, p 16)

Towards the end of September 1999, at the end of the project, a conference was organised by the Ministry of Education and Science (MES) in conjunction with other key organisations involved in the consortium delivering the project, principally the British Council. The conference, the final activity of the project, was designed primarily as a means of disseminating the results of the wider project to a wide audience and to look at how these results affect the implementation and delivery of VET provision in the short, medium and long term. Conference delegates were drawn from all organisations involved in the project including social partners such as labour organisations, industrial representatives as well as school directors, teachers and student representatives. Platform speakers included Ministers, representatives from organisations such as the ETF and some of the EU consultants involved, including the author. Initial presentations by key personnel stressed the overall success of the project. The consensus view, certainly that of the key players including the MES, was that it had been a highly successful project with all objectives having been met and, in some areas exceeded. The conference was certainly successful in publicising the achievements of the project as a whole, but it left unanswered key questions regarding the longer-term sustainability of the project.

Would the 'new' teaching and learning strategies actually be used by the Bulgarian staff in the schools? If not why not? Although the preliminary research indicated that the majority of respondents to the questionnaire were already doing so, this was a relatively small number of staff compared to the staff in the sector as a whole, which includes approximately 541 schools (ETF, 1999e). Would the apparent motivation of the teachers, in relation to the seminar inputs, endure beyond the end of the project? Of most concern however, given the reform of the curriculum, was the vast number of teachers not exposed to the 'new' approaches. The main emphasis was on training the teachers from the pilot schools involved in the project. The author calculated that little more than 250 *different* teachers attended the seminars overall, out of a total attendance of approximately 400. In terms of teachers attending the 'new strategies' seminars, this figure is even less, at 130 (BC Final Report, Table 2). This begs the question exactly what percentage of teachers does this represent of the total in the sector? Counterpart training, which was originally envisaged as part of the project in order to 'cascade' training throughout the system, did not take place to any great degree. This is one of the key areas of concern in terms of sustainability.

Although the wider applicability of modular and competency-based training systems within a Bulgarian context will be explored, it is the teaching and learning strategies associated with them and the role of the teacher within the schools that will form the main focus. By adopting a case study approach, the author plans to carry out fieldwork at some of the pilot schools in Bulgaria to identify:

- what key changes have been introduced since the reforms ?
- how do teachers within the Bulgarian VET system see their roles within the existing system?
- how do they currently carry out that role in comparison with how they used to do so under the previous system?
- what were/are the barriers to any particular change resulting from reforms?
- are the 'new' teaching and learning approaches being effectively implemented?

- what support is available to teachers in terms of further staff development and curriculum development time?
- what motivational and/or attitudinal factors might be involved in relation to implementing some of the general and specific reforms?
- what is the student's response to the changes?

Summary

This chapter has sought to provide an overview of the aims and intentions of the research by drawing the reader's attention to some of the key issues of concern regarding such projects. Whilst most of the emphasis will be concerned with specific issues associated with the actual 'implementers' of reforms in the classrooms and workshops i.e. the teachers, some of the wider contextual issues related to such things as, for example, resources will also be looked at.

On the basis of the findings related to the above points, and, with reference to the seminars the author has already been involved with, the author hopes to be able to identify key indicators that will affect the long-term transferability of 'new' teaching and learning strategies and on the efficacy of methods being used to 'transfer' them.

In the next chapter, the author will set the wider context of the research by providing a brief historical background to developments in Bulgaria. He will do this by referring to both political and educational developments in the country.

CHAPTER 2

BULGARIA – A BRIEF HISTORY

The Republic of Bulgaria, formerly known as The People's Republic of Bulgaria, is situated in the eastern Balkans in south-eastern Europe. The name Bulgaria comes from the word ' Bulgar ', Bulgars being a nomadic central Asian people who conquered the resident Slavs in what is now present-day Bulgaria, in the 7th. Century (Hall, 1998). The country is bordered to the north by Romania, with the River Danube providing a natural border, The Federal Republic of Yugoslavia to the west, the former Yugoslav Republic of Macedonia to the south-west and Greece and Turkey to the south. Bulgaria is also a maritime country with a 235-mile (375 km) long eastern coastline on the Black Sea. With a surface area of just under 111,000 sq. km, it is approximately 80% the size of England with a population of 7.8 million⁴. Apart from ethnic Bulgarians, who make up 83% of the population, other significant ethnic groups include: Turkish 8.5%; Gypsy/Romany 2.6%; and Macedonian 2.5%. (ICHR, 1998; CIA, 2000).

The Balkans has been a potential flashpoint that could unbalance power in the region for centuries (Moore, 1997). Bulgaria tried unsuccessfully to reclaim Macedonia in the Balkan wars of 1912 –13. At the outset of both World wars, Bulgaria declared its neutrality but eventually succumbed to German promises of Macedonia once more returning to Bulgarian rule by allying themselves with Germany. It was the outcome of the Second World War, which was to prove the most significant however.

The Second World War

During the first years of the Second World War, eventual alignment with Nazi Germany was an alternative to having to go to war with them, given that German troops were now on their doorstep, having overcome Greece and Yugoslavia. Despite some opposition in the country, the alignment was generally seen as favourable to

⁴ CIA official website published figures as of July 2000. Other sources from 1992 give a figure of 8.9 million with recent guide books quoting around 8.3 million. Whatever the true figure, it is clear that there has been a significant reduction in the population over recent years.

Bulgaria. A war had been averted, no Bulgarian troops had been killed in any action, some territories had been returned and their long-standing relationship with Russia, who fought against their Turkish oppressors, was still intact. Bulgarian confidence soon overstepped the mark however. After Bulgaria declared war on America and Britain at the end of 1941 (Mastry, 1996), the Allies unleashed an air offensive against Bulgaria, which flattened Sofia and a number of key strategic towns, which were supporting the Nazi war effort. Such events stirred opposition from within, and, spurred on by Allied successes in Italy, North Africa and Russia, this resulted in uniting Bulgaria's democratic forces to rise against the ruling fascist regime.

The Soviet Union eventually declared war on Bulgaria and invaded, without opposition, in September 1944. The Soviet's installed the Union of Democratic Force's Fatherland Front in power, who declared war on Germany and proceeded to commit troops to the Allied war effort in the Balkans. During the last year of the war Bulgaria acquitted itself well by driving Nazi forces from Macedonia and Serbia and advancing through Hungary as far as Austria where Bulgarian troops met up with The British Eight Army at Klagenfurt. This restored Bulgaria's standing in the world community somewhat and ensured that their pre-war territorial claims were acknowledged during the Paris Peace Treaty of 1946.

The Rise of Socialism

The Socialist movement in Bulgaria was established towards the end of the 19th. Century. It was not until defeat in the 1914-18 war however that they held any significant power. By this time, the Communist Party together with another socialist movement, the Agrarian Union, started to exert power and influence in the country. It was to prove relatively short-lived however. A coup d'etat in 1923 introduced over two decades of fascist rule, which lasted until the communist led Fatherland Front finally ousted the fascists, with Soviet support, in 1944 (Oren, 1971). It was not until 1947 however that the Bulgarian Communist Party (BCP) established full power. Effectively, the BCP was controlled by Russia with Bulgarians, previously exiled in Russia, including Georgi Dimitrov, the 'Father of the Bulgarian Socialist State', holding all the key posts (Tchukov, 1990). The newly developing Soviet empire in

eastern Europe experienced an early split in the ranks when the Yugoslavian leader Josip (Joseph) Tito fell foul of the Soviet leader Josef Stalin, who expelled Yugoslavia from the Communist economic trading bloc. This initiated Stalin to exert greater pressure on Bulgaria and the other Communist countries to toe the party line (Curtis, 1992).

Over four decades of communist repression followed in which brutal purges, 'People's Tribunals' and control of the media by secret police ensured that there was no organised resistance in the one-party state (Ibid). Religious freedom also ceased to exist with religious activities being severely restricted⁵ or banned altogether with the dissolution of Roman Catholic and protestant churches (Roucek & Lottich, 1964). The commencement of this period also signalled the end of the Monarchy in Bulgaria, after a carefully 'managed' national referendum.⁶ This resulted in Bulgaria becoming a People's Republic. Moscow's Stalinist policies continued to be implemented in Bulgaria by Vulko Chernenkov after Dimitrov's death. Chernenkov further repressed the Bulgarian people by adopting the Soviet isolationist policies and brutally suppressing cultural expression. Agriculture was subject to a state collectivisation policy in which the workers themselves had little say (Curtis, 1992).

A centrally planned economy was one of the main tenets of communist ideology. Working 'for the good of society', industrial and agricultural output was determined not by supply and demand, but by central administrators. Effectively, it was thought that the economy could be shielded from the effects of the business cycle. One of the results of this was the continued production of goods that were no longer needed – to stick to the plan and ensure continued employment (Ibid) Ultimately the results were more serious. Poor planning combined with unrealistically low production targets often masked under used capacity and poor quality goods. With fixed prices that did not reflect customer demand, or lack of it, the cycle continued with the focus on achieving the planned output rather than satisfying any customer / quality issues. All

⁵ For example, Orthodox clergy were forced into a Union of Bulgarian Priests and Muslim religious institutions came under the control of the state.

⁶ Interestingly, a decade after the fall of communism in Bulgaria, the exiled King Simeon Saxe-Coburg-Gotha returned to Bulgaria, forming the Movement for Simeon the Second party, eventually becoming Prime Minister.

able people of working age had guaranteed employment, even if their actual contribution to production was not required.

The Zhivkov Years

When Khrushchev replaced Stalin in Moscow, this new era required a new leader in Bulgaria. Todor Zhivkov became the new figurehead in Bulgaria and managed to outlast a succession of Russian leaders, eventually being removed during the events of 1989, which saw the dismantling of Communism across CEE. Zhivkov did attempt some reforms and experimented with some decentralization and encouraged some modest private enterprise, but ultimately these were never allowed the time or support to develop effectively and were doomed to failure. A lack of skilled labour and other resources, compounded by poor harvests in the early 1960s ensured an end once and for all, in 1963, to Zhivkov's experiments (Tchukov, 1990).

Zhivkov's problems continued throughout the 1970s culminating in the murder of Georgi Markov, an exiled writer living in London, which was claimed to be the work of Bulgarian State Security. The world community were repulsed by this apparent State sponsored assassination and Bulgaria's image abroad suffered as a result (Curtis, 1992). The rise of the Polish 'Solidarity' movement also gave cause for concern to the leadership in Bulgaria, as it did for other Eastern European countries. This initiated an increasingly vocal criticism of the Communist regimes in the region. To counter some of the growing criticism both at home and abroad, concessions were made, for example, to the various religious movements in Bulgaria, opening the way for Roman Catholics to worship again and the reconciliation of the Orthodox Church with the State. Zhivkov's standing was briefly restored in the country during the tenure of his daughter whom he appointed to a powerful position promoting the cultural identity of Bulgaria (Tchukov, 1990). This was very successful and turned around the cultural repression of earlier years and provided a proud focus for the country's cultural tradition.

Such optimism was relatively short-lived however and the 1980s ushered in a new cold war era between East and West. Debts mounted for Bulgaria, who tried to reduce

these by shipping abroad most of its 'quality' manufactured goods leaving the rest for home consumers. Increasing power shortages due to droughts and poorly maintained power plants affected much of Bulgarian industry. Bulgaria's image abroad suffered another blow by the official discrimination of Bulgaria's largest ethnic minority, the Turks. With growing birth rates amongst the Turkish population in Bulgaria and a zero birth rate amongst Bulgarians, bizarrely, Bulgaria initiated a campaign to 'Bulgarize' all Turks in the country, effectively erasing their national identity (Ibid). They had to take Bulgarian names, the justification being that the Turks in Bulgaria were descended from Bulgarians who had adopted Islam after the Ottoman occupation some six centuries previously. Zhivkov continued to lead the country, with close support from the Soviet leader Leonid Brezhnev and, to a lesser extent, from Brezhnev's successor Iurii Andropov. By the time Mikhail Gorbachov took over the Soviet leadership in 1985 and started to introduce his radical reforms, which he insisted the other communist countries should follow, it became clear that the future of the aging Zhivkov, together with that of the BCP was now in doubt (Tchukov, 1990).

Zhivkov's eventual removal was preceded in 1988 by Bulgaria's first elections in which candidates other than those endorsed by the BCP took place (ICHR, 1998). The collapse of Communism across Eastern Europe throughout 1989 and the commencement of sweeping transitional economic reforms in these countries were perhaps slower in gaining ground in Bulgaria than in neighbouring countries. This was reflected in The Communists retaining power in 1988, a year of mounting unrest in some Eastern European countries. Growing public demands for democratic reform over the following year culminated in an estimated 100,000 people demonstrating in the capital Sofia (Ibid). As a gesture to the people, Zhivkov, who had already recently been relieved of his Party General Secretary and Council President posts, had his Party membership removed. He was later arrested in 1990 as a result of corruption charges. This was not enough to save the Party however and, as discussions on democratic reforms took place between all the main opposition parties, the BCP became known as the Bulgarian Socialist Party (BSP). Surprisingly, with little more than a change in name, the BSP won the first fully democratic elections in 1990 (Meors & Begg in Pickles & Smith, 1998). Their victory was short-lived however and

public demonstrations grew. The National Assembly did vote to rename the country 'The Republic of Bulgaria' and they did remove all communist iconography from public buildings and the national flag but new elections were forced in 1991 and the BSP were voted out. The Union of Democratic Forces (UDF), were voted in but frequent changes in government throughout the 1990's combined with public lack of confidence resulting in continuing public unrest, has hampered Bulgaria's progress towards successful transition (Pickles & Smith, 1998).

The Slow Road To Transition

Any country that has been tied to the Soviet Communist regime for over forty-five years was unlikely to transform into an effective and successful pluralist and democratic society overnight. This is echoed by Hall:

“ Like most post-communist countries Bulgaria is presently in a painful transition time. The past, sheltered under the mighty USSR has vanished irretrievably and the future is uncertain”. (Hall, 1998 p1)

The fact that Bulgaria has still not yet fully achieved successful transition status, over a decade after the collapse of Communism throughout CEE is testament to this. This gives a clear indication of exactly how difficult such wide ranging and fundamental changes in a society are to achieve.

Quite how rapid the 'average' Western European expected the countries of CEE to become fully-fledged democracies is difficult to assess. One suspects that the majority would have expected a fairly rapid transition, especially given the democratic traditions in some of these countries prior to Soviet domination. This hypothetical view, however, could only be based on a perception that all CEE countries are 'the same', or at least similar. This is far from the truth however. As Mitter (1992) points out:

“ The term 'Eastern Europe' in turn suggests the idea of a homogenous region, which in fact does not exist”. (Mitter in Philips & Kaser, 1992 p15)

Whilst Eastern Europe was dominated by a communist ideology pre-1989, this did not mean that these countries shared exactly the same culture or values. On the contrary, there was and continues to be, vast differences in the cultural and societal make-up of the different countries of CEE based on centuries of development. Grant (1969) accurately observes that Eastern Europe is as much perceived as a political term as it is a geographical one. Yet the communist model in Albania, for example, owed more to the Chinese Maoist tradition than it did to the Soviet model (Mitter in Philips & Kaser, 1992). In fact Bulgaria and her northern neighbour Rumania were often at odds with their so-called Soviet masters (Grant, 1969). During the Stalin era, both countries signed a pact against the USA, which Stalin considered to be overstepping the mark somewhat (Mastry, 1996). Contrary to the COMECON ⁷agreements, Bulgaria, along with Rumania, also pursued their own industrial ambitions by independently developing large industrial complexes (Grant, 1969). Despite this, Bulgaria has always been seen by the West as a loyal Soviet supporter and has always been greatly influenced by the Soviets. It is interesting to note that during the last years of Communist domination in the region, when Gorbachov was introducing a more open form of Communism with his *glasnost* and *perestroika* incentives, the Bulgarian leadership stood alone in resisting such changes (Tchukov, 1990).

Notwithstanding Bulgaria's independent industrial development, it did more or less follow the principles of COMECON. Effectively, this led to an over-concentration of some industries in some countries and underdevelopment in others (ETF, 1999c). Ultimately, as far as Bulgaria was concerned, such central planning resulted in uncompetitive state-enterprises riddled with corruption and inefficiency with a management lacking in understanding of even basic worker incentive and company profit motives (Tchukov, 1990).

It became clear, that after the momentous events of 1989, for Bulgaria, it was going to be a long uphill struggle. The country simply did not have the human resources or expertise to establish let alone sustain a smooth transitional economy. Tchukov was more forthcoming:

⁷ The Council for Mutual Economic Assistance (COMECON) was established by nine Communist countries including the Soviet Union to identify clear divisions of labour between the countries.

“ The transition to such an economy is bedevilled by a sheer lack of experience across a whole range of activities which are regarded as crucial to the functioning of both commerce and government in the West”. (Tchukov, 1990 p25)

Commentators both at the time and later were in no doubt what the requirements were and under no illusions that the Western governments' key incentive to help was anything other than ensuring that the communist influence and power in the region should cease:

“ The ‘benefactors’ in the West who are eager to reshape her thinking and economic structure to be more like theirs, have of course their own agendas. This is not necessarily ominous, but something for Bulgarians to understand and keep in mind”. (Hall, 1998 p 8)

As communism started to collapse during 1989, just under half the population was in the employment market, with agriculture and heavy industry the two biggest employers accounting for 22% and 34% of the working population respectively. 50% of this labour population were women. Unemployment, a concept unheard of up to this time under the communist regime, started to make an appearance early in the 1990s, thus signalling the beginnings of a market economy. At the beginning of 1991, 72,000 of the workforce were already unemployed, which was less than 2%. By 1993 that figure had risen to 15.9% rising to 16.1% the following year. Of all the reforming countries of CEE Bulgaria has been the fastest to shed labour (Pickles, 1998). The latest estimates available, for 1997, put the unemployment figure at 15%⁸. Although both agriculture and industry have only experienced slight drops in their labour force overall, the services sector has grown to account for 43% of the labour force and accounts for 50% of GDP.

Unemployment was always expected to be one of the biggest problems as the country transformed its economy. The move towards privatisation of industry and closure of state-run industries, with increased competition between the newly privatised enterprises and the resultant links between productivity and wages were bound to

⁸ Website for National Statistical Institute, Sofia accessed May 2003. Source, International Labour Organisation Yearbook 1998.

stoke unemployment. Whilst the State accepted the responsibility for this, in the early 1990s it had few resources to address the problem. After the dissolution of the USSR, Bulgaria joined the newly formed Black Sea Economic Cooperation Zone (BSECZ) as part of its strategy to open up trade with other developing market economies in the region such as Armenia, Moldova, Russia, Ukraine etc. and other former key trading partners such as Turkey and Greece.

As other CEE countries adopted democratic and economic reforms at a much quicker pace, due to their more liberal incoming administrations, the 'blurred' change of regime in Bulgaria hampered progress (DfID, 1999; Vachudova, 1997). Much of this was due to the fact that many of Zhivkov's erstwhile colleagues remained in power. The neo-communist BSP disagreed with the UDF's proposal for a 'shock-therapy' approach, which would inevitably introduce short-term hardship and social problems, and rather insisted on a slower approach to reform to prevent such hardships. Such justification could not mask the fact that there were vested interests in slowing any reform and liberalisation programme. The results led to a moribund situation in which Bulgaria lurched from one problem to another throughout the mid-1990s, in turn *caused by and resulting from* frequent changes in government. The situation was described well by Pickles and Smith (1998):

"...in Bulgaria since 1989 almost annual changes in government, electoral reversals from communists to democrats to reformed communists and back again to democrats have typified the process of political democratisation." (Pickles and Smith, 1998 p1)

Things came to a head during 1996 and early 1997 when inflation reached triple figures. This hyperinflation saw the Bulgarian currency fall dramatically against all other currencies. In June 1996, \$1 was equal to 60 Leva. Little over six months later, by February 1997, 3500 Leva would have been required to buy \$1 (Pickles and Smith, 1998). In return for emergency aid, the IMF (International Monetary Fund) insisted Bulgaria implement a range of measures to check the spiralling loss of control of the economy, including new currency board conditions. This period was presided over by the UDF, who secured another term in office under Ivan Kostov in 1997. With the IMF measures in place, the economy stabilised and the country started to turn around. More recently, Bulgaria has signed a free-trade agreement with Turkey, which came

into effect in 1999. Also at this time Bulgaria joined the Central European Trade Agreement (CEFTA), which effectively superseded BSECZ, and lifted customs duties on 80% of its industrial goods. It was only the events of the most recent Balkans war, in 1999, which interrupted this progress.

The main aim of Bulgaria however is to fully integrate with the rest of Europe by becoming a full member of both the EU and NATO (North Atlantic Treaty Organisation). It has been a member of the Council of Europe since 1992 and has also been an associate member of the EU since that time. Bulgaria applied for full membership of the EU in 1995 and its whole economic focus and policies are directed towards meeting the requirements for full EU accession (see the map in fig.1 on page 34 showing Bulgaria in relation to other applicant states). Although great strides have been made, against the odds, in transforming key aspects of Bulgarian society, the EU does not thus far consider the country to have done enough for full accession into the EU. Even Bulgaria's support for NATO during the most recent Balkans conflict has done little to help her case in any concrete fashion.

The Effects of the Recent Balkans Conflicts

As pointed out earlier, the Balkans has been a source of conflict for centuries; with such a mix of people from different ethnic origins in the region it is perhaps hardly surprising. Bulgarian support for NATO during the Kosovo⁹ crisis however could have been seen as a very risky position to be in from the point of view of supporting the bombing of a Slavic neighbour, Yugoslavia. Historically however, Bulgaria has fought against the Serbs five times over the last century (Karadjov, 1999). Certainly Bulgaria supported UN sanctions during the Bosnian War and supported the NATO led Stabilization Force (SFOR) in Bosnia-Hertzegovina by committing troops to it. The Dayton Peace Accord of December 1995, which signalled the end of the Bosnian War, appeared not to address the underlying issue of Serbian ethnic cleansing. If it had done so, arguably, the subsequent Kosovo crisis could have been averted (Moore, 1997). Demonstrations against the continued aggressive acts by the Serbs against their Croat and Muslim neighbours took place throughout the region in late 1996 and

⁹ Bulgaria was the first country in the region to call for joint multilateral action in the Kosovo crisis.

early 1997. In Belgrade these took the form of direct protests against the Serbian leader Slobodan Milosovich. In Sofia, the demonstrations were aimed at the government, as much for the collapse of the country's economy as they were against the relative lack of government criticism aimed at Milosovich's excesses. It was during this period that the author made his first trip to Bulgaria. The country was experiencing 'hyper-inflation' at the time, one of the results being severe transport problems because of the removal of subsidies on fuel, which put the cost of it beyond most ordinary Bulgarians. The roads were almost completely deserted at this time.

Action was eventually taken against Serbia for the atrocities taking place in Kosovo with the commencement of NATO bombing of Belgrade. During the actual bombing campaign against Yugoslavia, the popularity of the ruling United Democratic Forces (UtDF, formerly the UDF, an alliance of pro-democratic parties) government, under Ivan Kostov, fell dramatically. This can hardly have been helped by several stray NATO missiles landing in Sofia's suburbs...¹⁰ The subsequent opening up of air corridors for NATO jets along Bulgaria's borders with Yugoslavia helped to prevent further such incidents. As a move to satisfy critics of the war, Bulgaria refused to allow the use of any of its military installations by NATO or to commit Bulgarian troops to be directly involved. Bulgaria has provided significant humanitarian aid in the region since the end of the conflict however. Whilst most ordinary Bulgarians were at the time happy with the eventual outcome of the war in terms of the country's standing in the world community, it severely impacted on its economic performance and transitional development.

A 60% rise in the governments approval rating by late 1999 must have given little comfort to the various industries and businesses who experienced sharp losses during the conflict.

" On 13 September (1999), the Bulgarian Minister of Trade and Tourism estimated that the country had lost 168.7 million leva (nearly \$90.7 million), caused by forfeited profits, spoiled produce, or breached contracts resulting from the NATO air

¹⁰ The author was in the country at the time and local newspapers reported local entrepreneurs selling missile shrapnel as souvenirs. One wonders about the current whereabouts of these 'souvenirs' given the current debate about Depleted Uranium shells.

campaign against Yugoslavia. Transportation companies have suffered most, losing 67.9 million leva. Private firms have claimed combined losses that total nearly 10 million leva with either the Trade Ministry or the Bulgarian trade and Commerce Chamber.” (Karadjov, 1999 p1)

Accession to the EU is still seen by many in Bulgaria as the ultimate prize for supporting NATO during the conflict, but as Prime Minister Kostov warned his people after the end of hostilities, whilst praising the balanced approach Bulgaria adopted during the conflict and saying that Western governments would not forget this, he was also:

“...publicly urging caution and restraint in expectations...” (Kostov quoted in Karadjov, 1999 p3)

Nevertheless, since the end of the conflict Bulgaria has been the recipient of additional aid packages from the USA and Japan to add to the continuing development aid from the EU. Despite a stream of key Western leaders visiting Sofia to thank Bulgaria for her support during the conflict, including the British Prime Minister Tony Blair, the American President at the time, Bill Clinton and the German Chancellor Gerhard Schroeder, membership of the EU looks as far away off now as it always has. Bulgaria is not amongst the ‘first wave’ of former communist East European countries set to join the enlarged EU in 2004. It will be included in the ‘second wave’ that is set to join ‘later’ (details of applicant states shown in fig.1).

After Bulgaria’s support for the USA and UK during the recent conflict against Iraq, once again, Bulgaria will no doubt expect recognition from her stance.¹¹

¹¹ At the time of writing this thesis, another global conflict involving the USA and her allies (principally the UK) has just taken place. The Iraqi regime of Saddam Hussein was attacked on the suspicion that the regime was stockpiling weapons of mass destruction. Although the hostilities have now finished, there is still a global political debate surrounding the justification for such an attack. The debate has been so fractious that it has caused serious splits in both NATO and the UN. Only the USA and the UK of the permanent members of the Security Council of the UN supported the war. It is worth noting however, that only Bulgaria and Spain of the rotating members of the Council came out in support of the USA and UK.

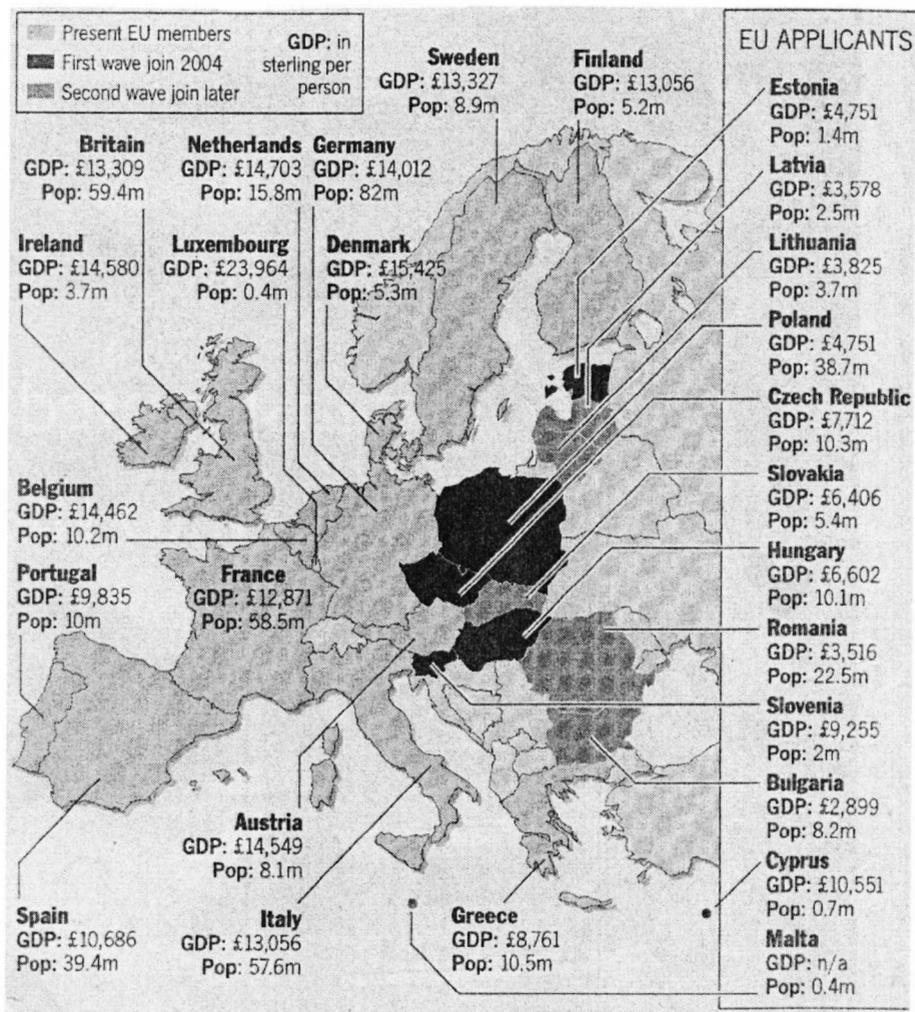


Fig.1 Map showing EU member states and applicant states as at Dec.2000. (Courtesy of The Sunday Times,)

So despite such support, Bulgaria has much to do yet. The EU has committed £50 billion on aid to applicant countries of CEE, much of this is destined to upgrade the basic infrastructure of these countries. It is widely accepted however that education can and must play a key role in the wider reform programmes of these countries and thus has and will continue to be a key focus for development aid (OECD, 2000; ETF, 1999a; Griffiths, 1997). Many of the earlier reforms that took place in CEE immediately after 1989 were reactions against the totalitarian regimes of the past and understandably sought to look back to the pre-communist traditions (Philips & Kaser, 1992). It was soon accepted however that the new emerging education systems should meet the demands of the new democratic societies. This is what prompted the educational reformers of CEE to look towards the long established democracies of the West for ideas and assistance. Approaches to VET and professional training in the West are proving to be of particular interest to the reformers. This is likely to be on

the basis of the widely held view that vocational and professional training and its efficiency have a strong impact on the development of the economy (Anweiller in Philips and Kaser, 1992).

The Bulgarian education system – the communist legacy

“ Education produces knowledge, skills, values and attitudes. It is essential for civic order and citizenship and for sustained economic growth and the reduction of poverty. Education is also about culture; it is the main instrument for disseminating the accomplishments of human civilization. These multiple purposes make education a key area of public policy in all countries.” (World Bank, 1996 pxi)

“The civic purpose of education-the sharing of values throughout society-is becoming more salient in the light of widespread liberalization of the past decade. This trend, which is most noticeable in Eastern Europe and Central Asia...” (Ibid, pxi)

Given this, it is all the more remarkable when you consider that little over a decade ago, this was far from the situation in the former communist states of CEE. What was perceived by 'the West' as 'civic purpose' was seen as something quite different under communist controlled regimes. Whilst liberal educational values as practiced and experienced, for example, in North America and Western Europe, might expose students to different and contrasting political ideologies, the operative words would be 'exposure' and 'different'. Under such systems young people are encouraged to discuss and question different approaches as part of a process of developing the knowledge to make informed choices. Under communism, things were quite different. Education was a key component of the communist indoctrination process (Phipps et al in Watts & Walstad, 2002; Roucek & Lottich, 1964; Shioniak, 1970). Lenin is quoted as saying:

*“...the school outside of life, outside of politics is falsehood and hypocrisy.”
(Lenin quoted in Roucek & Lottich, 1964 p12)*

This is why little emphasis was given to life outside the classroom:

“Students in colleges of education have been trained mainly in a traditional manner 'teach the lesson' without sufficient psychological and sociological information about life outside the classroom.” (Anweiller in Philips & Kaser, 1992 p34)

Roucek and Lottich (1964) recognized that throughout Soviet Russia's satellites, state-owned and state-controlled schools were parts of the communist political system, playing a key role in building socialism. Grant (1969) echoed this by saying that there was no real distinction in communist ideology between education and politics or between education and individual and social development.

Whilst this was the general situation throughout the Soviet controlled communist states, it was certainly not the case that all communist states approached things in exactly the same manner. It has already been pointed out that to suggest Eastern Europe is a 'homogenous' region is far from the truth (Mitter in Philips and Kaser, 1992; McIntyre, 1988). For example the Bulgarians' 'version' of communism was influenced by the division between reformism and Marxist orthodoxy dominated socialist thinking from the beginning of the regime after the Second World War (Oren, 1971). This led to a split in the movement in 1923, which resulted in the most prominent leaders, including Dimitrov, ending up living in exile in the Soviet Union. Unlike in most other Eastern European countries, after the Second World War, the Bulgarian people at large resisted communism's consolidation of power throughout the country (Oren, 1971; Roucek & Lottich, 1964).

"Charged with the task of reshaping Bulgaria to the benefit of the USSR, it has found considerable difficulty in gaining loyal supporters among the seven and one half million Bulgarians (Roucek & Lottich, 1964 p414)."

Towards the end of the 1960's in Eastern Europe, at the height of the 'Cold War', investment in education had become the biggest single item of non-military public expenditure (Grant, 1969). A series of measures designed to address problems of an educational nature were introduced over the years that Communism tightened its grip in the country. Dimitrov initiated a range of measures designed not only to improve the education system but also to promote a more efficient indoctrination process. Although on the surface these were designed to engender a 'new spirit of humanism' (Bizhkov and Miliankova in Jarvis 1992), the authorities were also clearly carrying out Soviet backed propaganda to develop a sense of communist proletariat nationalism. With some exceptions, principally Albania and Yugoslavia, most Eastern

European countries followed the Soviet model of Communism. As part of the 'Sovietization' of Bulgaria, teachers were expected to make daily references to the icons of Soviet Communism: Marx; Lenin; The Red Army. Teachers were also expected to regularly remind their classes of the 'liberation' of Bulgaria by the Soviets (Roucek & Lottich, 1964). This was not an entirely successful exercise however, as pointed out previously. Despite the authorities attempts at pushing Soviet propaganda, the Bulgarians are and always were a proud people and never fully swallowed this 'Sovietization' policy (Scott, 1998). In contrast to the clear emphasis that propaganda had in the education process, great strides were made in education under communism with almost universal adult literacy recorded across the region in 1989 (World Bank, 1999).

As identified earlier, Bulgaria regularly took an independent line from the Soviet Union. Contrary to the COMECON agreements, Bulgaria established its own industrial capacity to achieve some measure of economic independence. Such bold moves inevitably led to much displeasure at the Kremlin (Grant, 1969), but more importantly this led to an expansion in vocational education and training to train Bulgarian industry's technologists. With only a handful of trade schools of poor quality and few specialized schools available to train the new technologists, much of the training was tied to the big developing state industries. Between 1946 and 1989 such industries accounted for between 30 - 60% of GDP, double the share of GDP typical of other countries with the same per capita income (Pickles & Smith, 1998). With structural unemployment non-existent under communism and the large state owned plants absorbing large numbers of young people and where a narrow qualification could secure a job for life (Anweiller in Philips & Kaser, 1992), there was little call for change. Any calls for reform or criticism of the system were deflected by the relatively good performance of the Bulgarian economy (McIntyre 1988). Any educational reforms that did occur prior to 1989 were designed primarily to reduce the numbers of students in higher education and increase the number of students who could go directly to work at the end of their formal studies (Ibid). One of the achievements in the first decades of communism in Bulgaria was the expansion of higher education.

Prior to 1989 children were increasingly exposed to a vocational curriculum as they progressed through the formal school system. In grades eleven and twelve they spent the bulk of their time on course work linked to their future work. All academic and specialized schools had two-year vocational modules inserted in the curriculum (McIntyre 1988). Yet as global economic policies started to impact on communist CEE and in the Soviet Union, and Gorbachov started to preach *perestroika*, reforms became inevitable in Bulgaria. As already pointed out earlier in this chapter, the collapse across CEE of the large state owned industrial complexes and the increasing impact of world markets on Bulgaria's post-communist society created hitherto unheard of problems of unemployment. Since the events of 1989 Bulgaria has shed labour faster than other reforming country (Pickles & Smith, 1998). Although the need for reform of the education and training system in the country became more evident, the almost annual changes in government contrived to prevent any serious reform of the system.

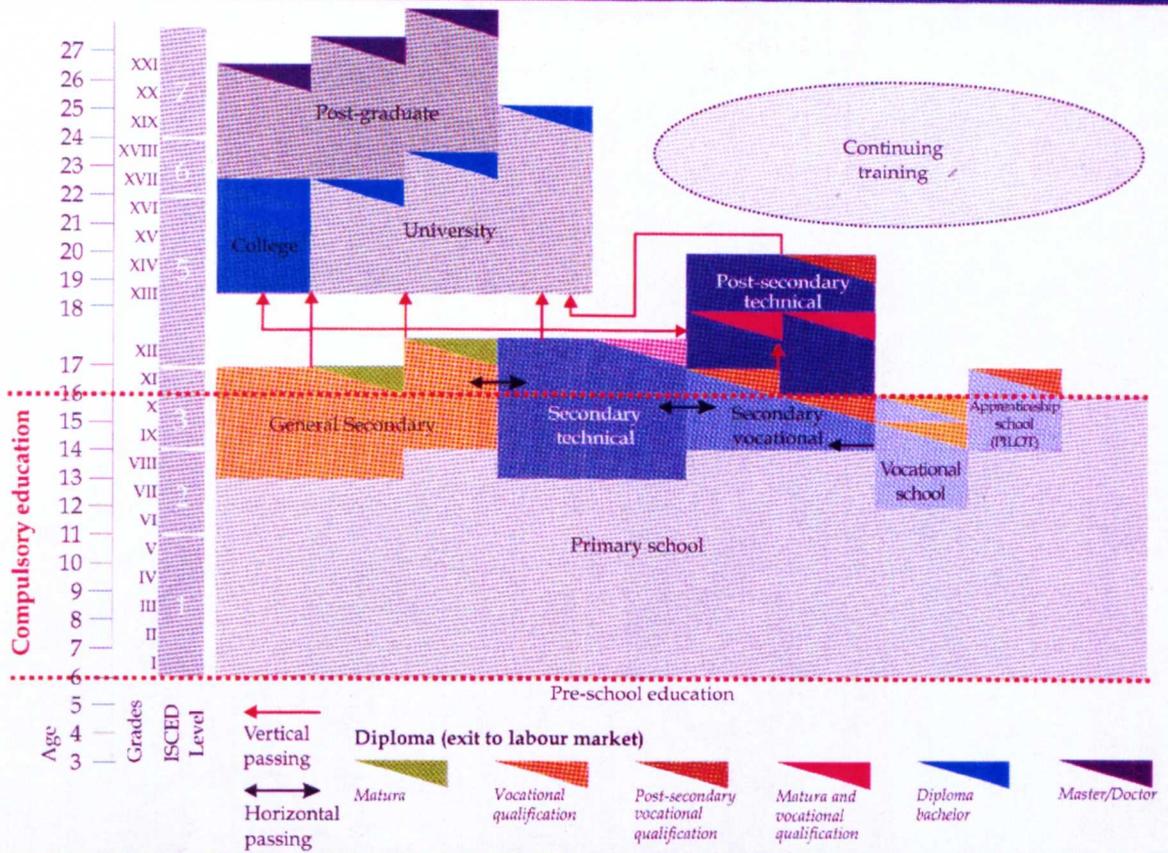
The Bulgarian Education Framework

Essentially the Bulgarian education system comprises three distinct levels: pre-school education; school education; and, higher education. 'School' education includes basic and secondary education. Pre-school education caters for three to six year-olds and is not compulsory. Basic education, the first stage of the 'school' education comprises primary (six – ten years) and pre-secondary education (ten – twelve years). Throughout this school education, children would be expected to achieve grades one to eight: one to four at primary level when a Certificate of Primary Education would be awarded, and five to eight at pre-secondary level after which a Certificate of Basic Education would be awarded. This education can take place either in state-run schools or in privately run schools. For the last two or three years of pre-secondary schooling, within grades six to seven and up to the age fourteen, some vocationally orientated subjects can be offered (see fig. 2 below).

Just as basic education is divided into two stages, secondary education is divided into secondary general / comprehensive, and secondary vocational and / or 'profile-orientated'. There are three basic types of school providing general upper secondary

education: the secondary comprehensive school, which covers both secondary and the basic education range and caters for up to grade eleven; the profile-orientated secondary school with intensive foreign language instruction, these cater for grades eight up to thirteen and entry is subject to an entrance examination and successfully achieving grade seven; and, the profile-orientated secondary school, which ranges from grade nine up to thirteen, entry is subject to successfully achieving grade eight. Secondary vocational education is attained at technical schools, entry to which is also subject to successfully attaining grade eight. The duration of secondary general education is normally three or four years at a comprehensive school whilst secondary vocational education normally lasts for four or five years at a technical school. Profile-orientated schools normally carry the nature of the 'profile' in their name eg. The Sofia School of Mathematics. Compulsory education in Bulgaria ends at sixteen, so most Bulgarian children will spend at least two years in some form of secondary school. Upon successfully completing a course of study at upper secondary level, school-leavers should have gained a Diploma in Secondary Education, which entitles the holder to continue into higher education if desired. This also gives access to the labour market. The qualification should clearly indicate the area of specialization.

Education system in Bulgaria



This diagram represents the first stage in the ongoing development of a standard graphical model for vocational education and training systems. Future refinements may include the further alignment of terms, student enrolment and dropout figures, and local language terms.

Fig.2. Diagram showing the Bulgarian education system (courtesy of ETF)

Vocational Education

The history of vocational education and training in Bulgaria can be traced back to the middle of the nineteenth century when Sunday schools were used as reading centres to enable Bulgarian craftsmen and apprentices to learn how to read and write. These eventually developed into more specialized Sunday schools, which provided more specific training in particular fields, such as agriculture (Bizhkov & Miliankova in Jarvis, 1992). However, by the end of the Second World War and the start of the socialist revolution, Bulgaria still had one million illiterate adults and 27% of its villages without schools. 100,000 children of compulsory school age never actually attended in 1944, and of those that did only 48% actually completed their elementary schooling (Bizhkov & Miliankova in Jarvis, 1992; Grant, 1969).

Training usually takes place from grades seven or eight, the age range being generally fourteen. Dependent upon the specialism, the training is of three or four years duration. Such training is provided in either a vocational technical school or a secondary vocational technical school, and there are about 541 such schools in Bulgaria, the majority being the latter. These schools are normally specialized in that they provide training in a particular specialism, unlike in the UK for example, whose equivalent colleges provide training in many specialisms. The name of the school usually denotes the actual specialism, eg. The School of Electronics, Sofia or The Clothing School, Russe.

The range of vocational subjects offered depends on the actual school. Some professional technical schools offer specialized three-year courses for specific occupations. The main schools, both state and private, offer vocational education and training in business. Financial services, accountancy and banking are offered in specialist state schools. Other specialist areas catered for include agriculture, electronics and transport. Many of the private sector schools cover the growing number of service industries including tourism. Programmes of study geared towards specific specialisms which fall outside the normal / state upper secondary schools sector whilst leading to professional qualifications suitable for employment do not give the holder automatic rights to higher education, only a secondary school Diploma is suitable for this.

Even before 1989 this sector has suffered from lack of investment, but with the collapse of many state industries since that time, things became much worse (ETF, 1999a). Often these schools relied on state industrial complexes to provide training facilities. Schools were often sited close to them with the students going on to work there. With many of these state industries now becoming privatised or disappearing altogether, it has created huge unemployment problems leading to the need for urgent reform (Begg & Pickles in Pickles & Smith, 1998). As with other reforms in Bulgaria however, change has been slower than in some other countries of CEE.

Bulgaria's vocational system, as with others in CEE, was based on both the social and economic conditions under which the country developed over the past 50 years

(Anweiller in Philips & Kaser, 1992). Apart from the problems identified above, students were required to complete a three or four year training period before being awarded any kind of qualification at all, a situation not unlike that which existed in Britain prior to the introduction of modular competency-based qualifications like NVQs. In recognizing not only the fact that Bulgaria needed a more flexible workforce and a system that accredited intermediate achievement, but also a system that was more in line with EU models and standards as well, Bulgaria sought the assistance of the EU in helping to reform its system of vocational education. This was entirely in keeping with Bulgaria's main foreign policy aim, to join the EU.

Quite apart from the desire to join the EU, Bulgaria also recognized the fact that across Europe VET systems were transforming to take account of developments in technology, working practices and demographic trends in terms of the increased mobility of workers. The concept of 'lifelong' learning and the likelihood that jobs were not for life and that regular re-training would be a fact of modern life was also not lost on Bulgaria.¹²

Summary

Having looked briefly at historical developments in Bulgaria, both politically and economically, up to the current transitional period, one can see how important education is, and vocational education particularly, in determining the country's future prosperity. Although the Bulgarian Ministry of Education Science and Technology (MEST) recognized that their vocational education system had served the country well under the centralized soviet economic model, they also accepted that this was now inappropriate under the 'new' market orientated economic model and that, like many other areas of Bulgarian life, it would need to change. Key weaknesses identified by the MEST were: a lack of flexibility – courses of fixed length in which students who left early received no credit for competencies gained; out of date teaching equipment and approaches to teaching in general; and, poor training workshops (MES, 1999a). Having identified the key weaknesses in the VET system,

¹² In September 2001 Bulgaria initiated a series of 'Declaration Days on Lifelong Learning' following their adoption of the EU's Memorandum of Lifelong Learning.

the Bulgarian government applied to the EU, through the European Training Foundation (ETF) for grant aid, through the EU's PHARE programme of assistance to the countries of CEE, to upgrade its VET system. In the next chapter, the author looks in detail at the project to reform Bulgaria's vocational education system.

CHAPTER 3

VET REFORM AND THE UVET PROJECT – TRAINING THE TRAINERS

During the immediate period preceding the collapse of communism across Eastern Europe, unlike most other countries of CEE, Bulgaria resisted moving towards a more pluralistic system of government (Tchukov, 1990; ICHR, 1998). Implementing the Gorbachov inspired *perestroika* reforms would take some time. Although some members of the government supported the reforms emanating from Moscow, they were soon removed from their posts by the dominant traditionalists in the Party. Despite a gathering wave of political unrest and anti-government protests, it was not until the November of 1989 that the General Secretary of the Bulgarian Communist Party (BCP), Todor Zhivkov, was removed from office, effectively signalling the end of the communist regime in Bulgaria. It took one of the biggest anti-government demonstrations ever seen in Sofia, upwards of 100,000 people, however, before discussions between the communists and the various other political parties led to tentative economic and political reforms (ICHR, 1998).

As we have already seen in Chapter Two, any hopes of a settled and steady course to reform were to prove short-lived. Just to remind the reader, the BCP, now renamed the Bulgarian Socialist Party (BSP), narrowly won the first democratic elections in 1990. Some concessions to reform were made, for example 'The People's Republic of Bulgaria was renamed 'The Republic of Bulgaria' after a vote by the Grand National Assembly in 1990. They also voted to remove all Communist iconography from the national flag and all public buildings. It took an angry mob however to finally remove the huge Communist red star from the top of the Communist Party Building in central Sofia. Smoke-blackened walls can still be seen on the outside of this building as a reminder of the angry scenes. A change of name and cosmetic changes to the national flag however, would not change the country overnight or remove the influence of the Communists however. Although anti-communist protests were a little more sedate than the more violent protests taking place in other parts of Eastern and Central Europe during the late 1980's and early 1990's (Bousfield & Richardson, 1996), and lacked the attention of the world's press, they were nevertheless significant in their

outcomes. As pointed out in the previous chapter, in 1991 during a new round of elections, prompted by further instability, the UDF squeezed into power ahead of the BSP by a narrow 1% majority. Instability continued however, largely the result of the economy still being tied to the large and inefficient state-run enterprises. It is hardly surprising then, that major positive changes to the economy would elude the country when those same industries were still dominated by the state. As Tchukov (1990) described at the time:

“...with the legacy of 45 years of communist mis-rule. This leaves them with 2,200 state enterprises which are at best uncompetitive with similar western firms, or at worst hopelessly riddled with corruption and inefficiency...” (Tchukov, 1990 p24).

Economic stagnation and political unrest reached its apogee in late 1996 and early 1997 when the economy collapsed totally leaving hyperinflation in its wake. The period of hyperinflation, running at over 300% for a time (British Council, 1997; Coutsoukis, 2002), was relatively brief however and a new caretaker government heralded the influx of emergency assistance from the EU and the International Monetary Fund (IMF) (Shafir, 1997). It was during this particular period of turbulence that the upgrading of vocational education and training (UVET) project got underway.

The PHARE Programme: ‘Vocational Education and Training; Education, Research, Science and Technology’ (VETERST)

The PHARE programme had seven components overall but it is the Upgrading of Vocational Education and Training (UVET) component that this section focuses on. Other components addressed financial management of secondary education, the development of a national science and technology policy, reducing the number of school drop-outs, the establishment of a national evaluation and accreditation agency, the development of a science park network and the establishment of a project management unit to oversee the whole PHARE programme.

Upgrading Vocational Education and Training (UVET)

The UVET project commenced in September 1996 with a budget of 3.7 million Euros. The main project objectives were identified as an opportunity to develop the Bulgarian VET system at two levels:

- at school level: to update the vocational curriculum in line with EU standards, upgrade the schools and provide staff development for the managers and teachers.
- at the national level: to develop policy and procedure recommendations to government to sustain the effects of the project and to prepare the national VET system in Bulgaria for the 21st century. (British Council UVET Consultant's Guide, 1997 Ch.2, TOR)

At the school level the main focus was in developing modular curricula in selected vocations and piloting these in specially selected schools, which would also be fully equipped to support implementation. At the national level, the development of national standards in all the selected vocations were the key objective, based on industry / labour market needs. A national policy on VET, with industry involvement, was also identified as a key outcome (British Council, 1997). This latter outcome would be facilitated by a change to the legal framework, effectively, the enactment of a new law on VET.

Alongside and complementing the above, a comprehensive programme of staff development to support the reforms was also a key component of the project. This included intensive residential training workshops in Bulgaria and study visits to the UK and Ireland for all the key players tasked with sustaining the project, including MES personnel, school directors and the teachers themselves.

The Project - Project Rationale and Project Objectives

There is no one single universal reason that provides the impetus for training reform. However, as Fluitman (1998) observes it is possible to identify a number of common strands. These arise from concerns either within or outside the training system about the relevance of the training, the effectiveness and efficiency of it and also budgetary constraints / concerns. All of these could be counted amongst Bulgaria's concerns in relation to training reform. One other key factor however overrides all of these. Membership of the EU has been on the agenda for Bulgaria ever since they signed the Europe Agreement with the EU in 1993. However, it became Bulgaria's main foreign policy issue in 1995 when the Bulgarian National Assembly adopted a decision to submit a request for full membership. Some Bulgarian observers have likened the push for EU membership to some kind of mantra that, if repeated often enough, will without doubt, ensure a cure for all Bulgaria's economic and social problems (Karadjov, 1999). Quite apart from the fact that as part of the conditions of accession, Bulgaria must adopt EU standards, key policy makers and politicians in the country must have been aware anyway, that they must also attempt to keep up with the rapid changes that were taking place throughout the rest of the EU, particularly with regards to human resources development and VET.

The European Union had been involved for some time in a radical shake-up of its VET provision. Partly as a result of changing employment patterns and demographic trends, and partly due to the impact of 'new' technologies. A reduction in the traditional heavy manufacturing and production industries with a corresponding increase in service industries, combined with the changing skills profile required by workers in member states had led to a reappraisal of vocational training requirements (ETF, 1999a; Finegold et al, 1992). If we add to this the relatively recent adoption by many Western European countries, of concepts such as 'Lifelong Learning', and other equally high profile educational policies, one can see that to develop at anything like the pace required to even remotely keep up with earlier developments would be difficult for Bulgaria. Interestingly however, the concept of 'Lifelong Learning' is anything but new to Bulgaria. It was certainly on the educational agenda in the 1970's

and has strong communist links in terms of an ideal going back to the very founders of communism:

“The idea of lifelong education was already expressed by Karl Marx. In the close link between education and production he saw both a means of increasing the efficacy of social production and a factor for enhancing the multilateral development of one’s personality.” (Micheva et al, 1982 p99).

The Ministry of Education and Science (MES), fully aware that radical change was necessary in its VET system if the wider objectives of the economic reform programme were to succeed (MES, 1999a; UVET Consultant Guide, 1997), agreed to VET reforms and secured a EU grant to undertake the reforms. The resultant UVET project was designed to assist this process. Although the awarding of such grants is by no means a foregone conclusion to actually applying for one, with development of initial and continuous VET systems seen as a priority area by the EU, with a sound bid, the outcome must have been in little doubt.

The main aim of the project was to improve the standards and quality of vocational education and training in Bulgaria in the secondary and post-secondary VET sector. This was to be achieved in three specific areas: at the national level through changes to the legal framework leading to the involvement of social partners in the design and implementation of VET, the development of a new VET policy and the development of national standards for all VET curricula; at curriculum level through the development of modular curricula in selected pilot schools together with resources to facilitate implementation; and finally, staff development through the provision of targeted training workshops and practical study visits for teachers, school directors and MES personnel responsible for the longer term sustainability of the UVET project. It was in this latter area that the author became involved in the project. Although keen to become involved, the author did have some concerns, particularly concerning the wider aspects of the project. Whilst the project did not explicitly involve helping Bulgaria to establish a competency based training (CBT) system, this was likely to be one of the potential outcomes given the nature of and the direction VET had taken in much of Western Europe and beyond already. Certainly, with curriculum specialists drawn from the UK and Ireland acting as consultants on the

curriculum development aspect of the project, and whose experience and current practice was heavily dominated by competency driven systems, the resultant modules were unlikely to be dramatically different.

In itself the adoption of CBT might well be desirable and there are most certainly those who strongly advocate it and are quick to point out the benefits (Jessup, 1991), but there are also issues about context and transferability to consider. Much has been written about the problems of exporting systems of education and training from one country to another (Hyland, 1998; King 1993, Stevenson 1992). The competency approach to training itself has many critics (Hyland, 1994; Smithers, 1993; Stevenson, 1992). However, despite the possible wider implications of the project, there were more pressing problems to consider.

Training of the trainers: innovative practice in education - 'new' teaching and learning strategies

When the author first became involved in the project, the terms of reference were brief and to the point:

"...two short - term experts to work as a team to deliver interactive workshops on developing new / alternative teaching and learning methods / strategies for UVET teachers involved in the project throughout Bulgaria..." (UVET Consultant's Guide, 1997 Ch.2 TOR)

Whilst, on the face of it, a relatively straightforward brief, as someone who has had experience of working on educational development projects in a number of other countries, the author was acutely aware of the possible problems that may have been encountered as a result of cultural and contextual settings, not to mention problems arising out of differences in language. Moreover, a decision had to be made at an early stage as to whose interpretation of the terms 'new' and 'alternative' were to be adopted and exactly how these related to 'innovative practice'...another term frequently used in relation to this aspect of the project.

If one considers the term innovation, looking back over the development of educational theory and strategy since the beginning of the 20th century, so-called innovative, new and alternative strategies have been put forward on a regular basis. Currently, the term is widely accepted as referring to the use of Information and Communication Technology (ICT). Such things as video conferencing, the use of computers for 'e-learning' using the Internet and a host of other, largely electronic / technology based innovations are now revolutionising education. As far as the staff development aspect of the project was concerned, if not the UVET project as a whole, the reality was a little more modest. Innovation here was effectively concerned with a move away from traditional, teacher-dominated education and training. In its own way, this was no less a 'revolution' than electronic developments in education in the West. This is in no way to suggest that ICT was not also having an impact in Bulgaria, quite the reverse in fact. A burgeoning computer based technology was rapidly making its presence felt in the schools and colleges. At a classroom level however, things were quite different.

Just as the introduction of ICT in the 1990s is not universally welcomed (McWilliam & Taylor, 1998), previous 'innovations' were likewise not without their critics, although many of them were embraced by much of the education world. For example the programmed learning approach based on the behaviourist theories of Thorndike and Skinner, and before them Pressey, spanning much of the early part of the 20th century through to the 1970's, was challenged by Peters, amongst others, who described Skinner's work as:

"...Naïve fanaticism...(that has)...pushed instrumentalism to its logical limits."
(Peters in Rich, 1985 p92)

At the opposite end of the spectrum, the humanist learning theories as put forward by Rogers, also challenged by Peters, the critics were never far behind. Grander theories, based on the liberation and revolutionary potential of education as put forward by, for example Gramsci and Freire, were also not without their challengers, in the latter's case, Elias. Freire published his *Pedagogy of the Oppressed* in 1970:

"...as a humanist and libertarian pedagogy..." (Freire, 2001, p54)

Essentially, Freire's view was that by recognising and perceiving their oppression, through education, the illiterate masses could ultimately make a significant contribution to political, social and cultural change. Whilst there is much talk of 'revolution', Freire concedes that he has no concrete experience of it, however he says:

"The fact that I have not personally participated in revolutionary action, however does not negate the possibility of my reflecting on this theme." (Ibid, p39)

Elias likened this publication to:

"...a handbook outlining the type of education necessary to bring about political and social change." (Elias in Rich, 1985 p102)

Elias goes on to state that:

"In attempting to forge a universal theory of revolutionary pedagogy, he oversimplified to a dangerous degree the concept of oppression and the pedagogical programme." (Ibid, p106)

Antonio Gramsci's writings have been interpreted in a number of different ways, dependent upon the political line of those who were claiming or disclaiming him (Mouffe, 1979). His writings ranged far and wide, however, he is closely associated with his interpretation of Marxist theory. In his writings on education, like Freire, he saw the revolutionary potential of education. He saw education as a tool for creating working class intellectuals. He did acknowledge the difficulties of challenging the existing system however:

"If our aim is to produce a new stratum of intellectuals, including those capable of the highest degree of specialisation, from a social group which has not traditionally developed the appropriate attitudes, then we have unprecedented difficulties to overcome." (Gramsci in Hoare & Nowell Smith, eds., 1971 p43)

The writings on education by both Freire and Gramsci could almost be described as 'revolutionary manifestos' in many ways. Whatever new educational theories are developed, they all spawn their own particular learning / teaching strategies at the

learner / teacher classroom level. For many years, in the West, traditional teaching was based on the acquisition of information / facts. This quantitative approach, which critics say only scratches the learning surface (Campbell et al, 1996), is best exemplified perhaps by such things as rote learning, an approach the Soviets put a premium on (Phipps et al in Watts & Walstad, 2002). Teachers were seen as the fount of all knowledge; they were the controllers of the education process, didactic, teacher-dominated and teacher-paced. Pupils / students were simply passive recipients of information, which in turn, was regurgitated during examinations. From the late 1960s and through the later decades, a more humanistic approach was adopted based on student experience or student-centred approaches, best exemplified in the work of Carl Rogers (1969). The focus of the educational process was put on to the student / pupil, with subsequent emphasis on the learning process rather than just the teaching process. The teacher became more of a facilitator, helping and guiding students rather than 'telling' them. This constructivist approach to teaching utilises a deeper, more qualitative approach to the learning experience as a whole.

With the adoption by many countries of the competency based approach to training in post compulsory VET, an interesting hybrid approach came to the fore that is characterised by both behaviourist *and* humanist principles. With practical based occupations particularly, tasks have been broken up into specific competency areas each separately assessed. The practical performance aspect of training is very behaviouristic in approach whereas the 'underpinning' theoretical job knowledge that students also require, is largely self-taught through the use of student-centred resource packs, where the students learn at their own pace, often independently of direct teacher involvement.

This is perhaps something of an oversimplification but nevertheless serves to illustrate the point, and indeed illustrate, more or less, the current situation regarding VET in much of the so-called 'developed world'. In Eastern Europe, on the other hand, having been tied to a strong, centrally controlled administration throughout the years of state socialism, and with the spreading and consolidation of communist ideology being a prime function of education (Shimoniak, 1970), the teacher was still seen as a disciplinarian and controlling figure. Hand in hand with this went the strict teacher

dominated methodologies of instruction. Despite some reforms of the general curriculum, reflecting the rejection of the communist ideals, the teaching methodology remained largely the same, resembling, more or less, what could be described as 'traditional' teaching, in which the teacher is seen as the central focus of attention.

Although, as previously pointed out, it was not explicitly stated as one of the UVET project outcomes, the proposed development of curricula along modular lines did imply a move towards a more competency - based training system. Furthermore, such systems involve approaches and strategies that 'traditional' training does not always employ. CBT itself can certainly be considered as a typical outcome of VET reform, since it arguably addresses some of the key concerns already identified as causal factors in VET reform. It will be useful here to summarise some of the key characteristics, for the purposes of comparison, of both 'traditional' approaches to training and CBT.

Traditional training

Competency based training

Course based

Unit and / or module based

Fixed length course /time served

Trainees progress according to individual capability

Award only possible upon successful completion

Units / modules accredited separately

*Assessment with an emphasis on what a trainee **knows***

*Assessment with an emphasis on what a trainee **can do***

Assessment tied to college / centre

Assessment work or college / centre based

Assessment based on subjective grading / marking

*Assessment based on
objective performance
criteria*

No standardised marking

National performance standards

Limited industry involvement

Industry developed standards

The differences between both approaches are not always as stark as they are identified above. For example the balance between what a trainee can do and what a trainee knows, in terms of their possession of overall background job knowledge, is crucial to actual successful performance. A balance between the underpinning knowledge required for successful performance in any particular occupation or task is not something that was always fully appreciated by the early architects of CBT systems. This is something that was quickly identified by critics of CBT (Hyland, 1994; Smithers, 1993). Also, it is true to say, that with traditional approaches to training, there may be a significant amount of industrial involvement, particularly in the area of work experience. This was often the case in CEE, the only trouble being, in common with other transitional economies, that many of the industries that were involved in training could not actually provide jobs for their trainees (Kitaev, 1999). With the reform of the wider economy and the resultant move away from a bureaucratic and highly centralised and controlled state system, of necessity, this would require a move away from training tied to the often inefficient state run enterprises that could not, as we have seen, in any event, provide sufficient work for their trainees, towards a more effective and efficient means of training the workforce. One which would equip trainees with more relevant, flexible and transferable skills. The moves towards VET reforms and the introduction of a modular / competency based approach would have one significant impact on existing approaches – the move away from a teacher-dominated curriculum to a curriculum that puts the emphasis squarely on the student. In other words student-centred learning was to become the main focus of this aspect of the project. Something that could be seen as anathema to the teachers involved, given the school traditions under communism.

It is always dangerous to make assumptions however, and the author's knowledge of Bulgaria, its traditions and its people was limited at the outset of the project. What was known however was that Bulgaria has a long tradition of VET that at one time, on the face of it at least, appeared to serve the country well under the previous regime. This in itself pointed to some of the possible problems and issues that had to be faced:

Potential problems

These included:

- communication problems as a result of mis- translation / mis - interpretation (and mis-representation...)
- reaction against 'outsiders' telling us what to do and how to do it
- a reluctance to take on board new ideas
- reluctance to accept that the existing system needs reviewing to see if it meets the wider requirements of society, industry and the students themselves
- suspicion of the 'wider objectives' of the PHARE programme - perhaps even of 'westerners' themselves

The Seminars: some reflections

JUST A

As far back as 1991 the then Minister of Public Education in Bulgaria, Prof. Dr. Matey Mateev, referring to educational reforms in the country, was keen to:

"... liberate the initiative of the students, teachers, educationalists, schools, parents and society as a whole..." (Mateev in Turner, ed., 1991 p227).

Had it really taken all this time before such an ideal had actually begun to be implemented? Certainly as far as this author was concerned, much of the focus of the seminars would be to facilitate precisely this.

Regardless of the potential problems identified above, the first series of seminars had been arranged, and were due to take place throughout March 1997 in centres serving staff from four separate regions of the country (see fig.3 below). The centres included: Stara Zagorra; Bankya (outside Sofia); Varna; and, Pazardjick. Materials had already been prepared and sent out for translation in advance. In many ways the future of the project as a whole depended on a successful outcome to this first series of seminars. There was no way of knowing precisely what delegates had been told about the objectives of the seminars, nor of what they had been told, if anything about the 'foreign experts' who would be delivering them. Initially, there did appear to be some slight reservations from some delegates towards the 'foreign experts'. It turned out that this was more to do with the fact that the author and his colleague did not fit in with the expected stereotype of the bowler - hatted and pin - stripe suited Englishman with an austere expression carrying a rolled-up umbrella in one hand and a copy of The Times under his other...Upon being told this, one had to wonder exactly what overall view Bulgarians had of the West in general based on the teachings of an Eastern European communist regime which was not averse to creating its own version of history.

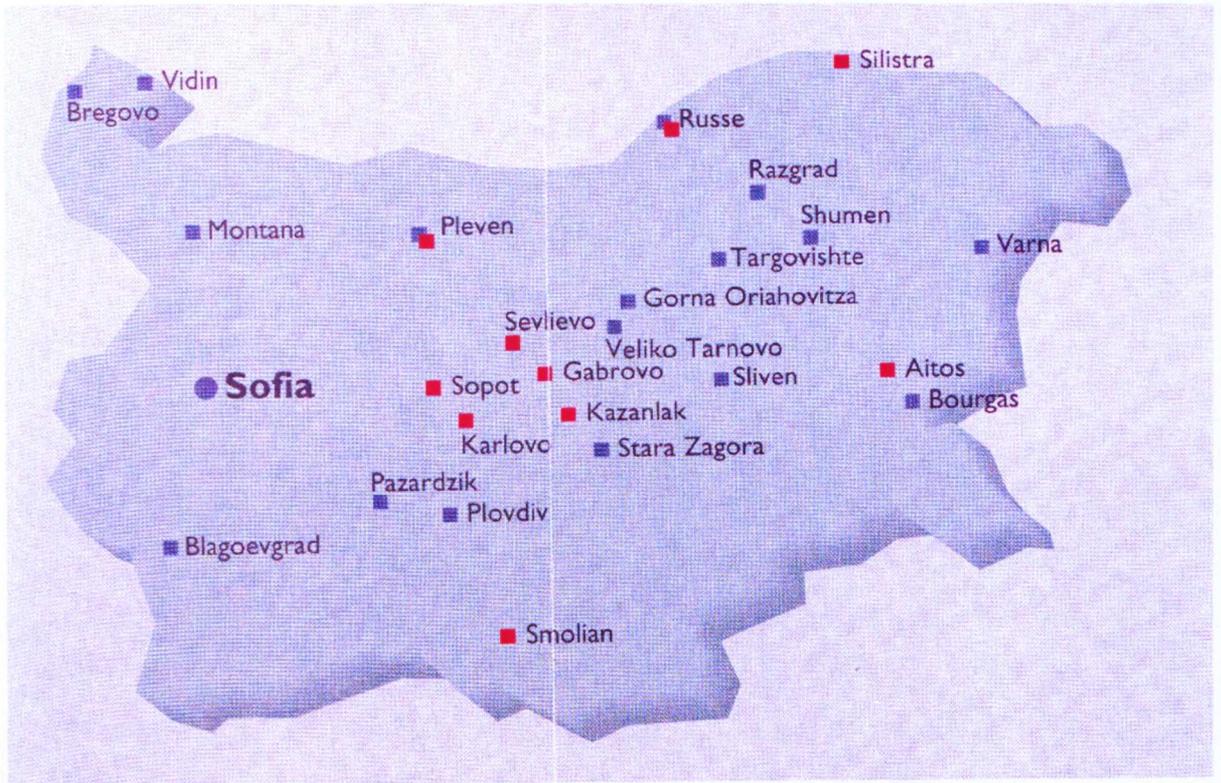


Fig.3. Map showing project school locations (courtesy of EU/Phare)
 (The darker (red) locations were project curriculum dissemination centres)

Any such reservations quickly melted away when it became clear that the ‘consultants’ had no intention of telling delegates what to do or how to do it, rather, that they were going to share good practice. This would be based on proven experience, the main focus being to present approaches and strategies that delegates may not be familiar with so that their relative merits and limitations within a Bulgarian context could be discussed. Delegates’ initial reservations took an even further jolt when it became quite clear that the author thought that the whole learning experience should be enjoyable, happy and memorable, something that appeared to be rather an alien concept in terms of delegates previous staff development experiences. Assumptions and perceptions about the ‘foreign experts’ were therefore being broken down early on even if some of the language barriers still existed. The author himself was not above making assumptions. Indeed, certain assumptions, from afar, had to be made in order to at least have a contingent programme ready to deliver. Without the luxury afforded by preliminary detailed research time, it was decided to assume that the information contained in the consultant guide was accurate, and that most teaching

in the Bulgarian secondary technical sector was largely teacher - dominated with the emphasis on teaching rather than learning. It was further decided to use the first week's seminar as a testing ground to find out exactly what teaching strategies were normally used within the sector and what the teachers knew about 'alternative' strategies. In short, some kind of delegates 'needs audit' was required. A high-risk strategy was decided upon from the start...a role-play on communication. The author was of the opinion that this might elicit a clear indication of where and how to proceed.

Tables and chairs were arranged in regimented lines with rows of delegates all facing the 'experts' but not each other. After enquiring whether delegates were all happy with the seating arrangements, which they were, several minutes of role play, followed by discussions on aspects of communication, prompted the author to again enquire as to whether delegates still considered the seating arrangements as being fine. The now negative response initiated the author and his colleague to leave the room instructing the delegates to arrange the furniture themselves to better facilitate communication between all participants.

From this starting point, a programme evolved that was partly designed to place delegates into some of the situations, and experience some of the feelings and emotions, that their own students might feel, thereby creating a focus for discussion. A strategic combination of formal inputs, group activities and games, tasks and workshops followed by individual and group presentations facilitated this. Did the strategy work? Yes, at least in the short term. Both formal and informal evaluations carried out at the time were unequivocally positive appearing to suggest that the author and his colleague had some interesting and exciting ideas worth pursuing, that they could provide strategies to motivate and engage students and that they were willing to accept delegates as friends and colleagues. Equally, the author found delegates to be warm and generous people, capable and willing to consider new approaches and take on new ideas where appropriate, capable of adapting new approaches to their own situation and willing to accept the author and his colleague as friends and colleagues.

Effectively, the concept of 'learning by doing' became the focus of the seminars, as befits the move towards a modular, and possibly competency based, system of VET. Correspondingly, the emphasis was put on what students *can do* rather than what they *know*. The key characteristic of the 'new' approach was a move away from didactic teacher-centred strategies over to more student-centred strategies - the key word and focus therefore was now on *learning* rather than *teaching*. This presented what could have been potentially one of the biggest problems of the whole UVET project...Initially, the author was told that in the Bulgarian language, the same word is used for both teaching and learning¹³...This became apparent right at the outset of the first seminar, long after the resource materials had been translated. Only after careful discussions with translators did it become clear that there was a distinction. This should not have come as a surprise however. It is highly likely, that outside of the education world, most people would use the terms teaching and learning interchangeably, no matter which country they are from.

Nov
1997



Fig.4. Delegates discuss learning package production task

¹³ In Cyrillic script the verbs for teaching and learning are more or less identical, albeit with slightly different pronunciations: 'uchenie' and 'uchene' respectively. If both words are used in the same phrase, the less common 'obuchenie' is used for teaching to try and differentiate.

With the emphasis on learning rather than teaching, it creates an immediate shift in the responsibility of the whole process, from teacher to student, with a corresponding shift in the role of the teacher. This, along with other related areas formed the core concepts and discussion areas for the seminars, with a series of experiential approaches used to convey the concepts.

Concepts, discussion areas included:

- the changing role of the teacher
- student-centred learning
- ownership and responsibility in learning
- competency-based training
- core skills
- distance / individualised / resource-based learning
- work-based experience and assessment
- assessment of performance to national standards

Learning / teaching strategies employed and presented included:

- team teaching
- ideas-storming
- gaming
- simulations / role plays / case studies
- problem solving
- individual / paired / small group / large group / team tasks
- workshops / information seeking exercises
- individualised learning package materials development
- individual and group presentations

Seminar outcomes

The author went on to spend a further twelve weeks delivering staff development seminars in Bulgaria making a total of sixteen weeks, spread over three years, on the project. Although not all inputs were specifically focussed on teaching and learning strategies, the strategies employed were very much learner centred. Along with other colleagues' input on staff development, the total number of weeks spent on this aspect of staff development was in the order of twenty-two weeks with a further five weeks UK - based staff development. Taking account of those delegates who attended more than one seminar, the approximate number of different delegates attending the seminars was likely to have been in the region of 250 out of a total attendance of 400. So approximately 250 teachers from the sector have been exposed to 'new' teaching and learning strategies, although the project final report refers to 'a cohort of 130' who specifically attended the 'new strategies' seminars. Whatever the figure, it does beg the question exactly what percentage of teachers does this represent of the total in the sector? It is likely to be a very small percentage indeed.¹⁴ This is one of the key areas of concern in terms of the project's overall sustainability. Notwithstanding this concern, there were some tangible outcomes. Quite apart from being able to apply many of the strategies associated with student-centred learning, teachers were able to produce a range of draft documents ranging from student-centred learning resources, to various forms of outcomes based assessment instruments.

Such outputs, in terms of the project brief, can be seen as a measure of its success. What of the views of the teachers themselves however? How did they respond overall to the seminars? There is no question that delegates were ready and willing to take on board many of the approaches and strategies presented to them throughout the series of seminars. The response, based on both formal evaluation questionnaires and informal discussions was overwhelmingly positive. Even taking into account the cultural 'politeness factor'. The motivation and, often, excitement at the prospects of using such approaches in their schools was tangible. The following anecdote sums up

¹⁴ In fact according to the ETF (1999e) in 1997/98 there were 18,446 teachers in vocational schools, therefore, on these figures, the total number trained is less than 1%.

best, for the author, the apparent impact the seminars were having. In conversation with a school director whose staff had attended one of the author's previous seminars on 'new teaching and learning strategies', she told the author:

"...It was a Monday morning in the staff room and, as is usually the case at the beginning of the week, staff spirits were low. However, the staff who attended the seminar the previous week began to tell us all about the previous weeks events. They continued to describe and enthuse about the seminar non-stop for over an hour. As they continued to talk about it our spirits began to lift and continued to do so. Everyone became happy and motivated to continue..." (Unsolicited comments made to the author by a Bulgarian Secondary Technical School Director, Nov. 1997)



Fig.5. Delegates enjoy an active learning session

These were entirely unsolicited comments yet remain one of the most telling and rewarding of 'performance indicators' in connection with the seminars. Certainly by the end of each seminar delegates appeared keen and motivated to go out and experiment with / implement the various approaches and techniques within their schools and centres. However, there is a concern that without continuing support and help, the momentum associated with such initial enthusiasm will be lost.

In the eyes of many, the project has been an overall success. This was certainly the message portrayed at the end of project conference in September 1999, referred to in Chapter One. Certainly many of the reforms are now in place in terms of such things as certification and the establishment of a National Qualifications Framework. Also, a National Agency for Vocational Education and Training (NAVET) is also close to being established. Further moves designed to de-centralise management of VET and make it more efficient, cost-effective and relevant are encompassed in the new VET law which was ratified by Parliament in July 1999. Of course legislation is one thing but success must also be judged on the ground...or in the classroom / workshop as far as the staff development aspect of the project is concerned.

At that time, the author was concerned about the future? Would the 'innovative' teaching and learning strategies actually be used by the Bulgarian staff in the schools? If not why not? Will the apparent motivation of the teachers, in relation to the seminar inputs, endure beyond the end of the project? On the surface at least, despite earlier concerns, there appeared to be few indications that there would be significant barriers to implementing the 'new' strategies in the schools, notwithstanding the possible financial implications associated with full implementation of a modular based CBT system. It was clear then that only follow-up research would confirm or contradict this. Of more concern, given the reform of the curriculum, what about the vast number of teachers not exposed to the 'new' approaches? It has already been stated that counterpart training, originally envisaged as part of the project in order to 'cascade' training throughout the system, did not take place to any great degree. In fact the very nature of vocational teacher training in Bulgaria can be seen to be fundamental to the longer-term sustainability of the project. As pointed out earlier, the MES recognised this, and it is worth repeating the following quote:

“ The performance of teachers is the single most important factor in the education and training of students.” (MES VET Policy Document, 1999b, p16)

Although it may have been many years since technical and vocational teachers in Bulgaria were reported as being poorly qualified, with most of them being either from vocational trade organisations or either students who had done little more than just complete their own vocational studies (Shimoniak, 1970), there is still little in the way

of a comprehensive teacher training course available for vocational teachers in Bulgaria. Astonishingly, it is possible to gain a teaching qualification without actually having undertaken any teaching practice or demonstrated any teaching skills ... (MES, 1999a). Whilst the MES appears committed to changing this situation, resource implications may hamper the process. What happens in the meantime?

The focus of the research

The apparent success of the series of staff development seminars that took place over the life of the project, provides a good indicator of the wider applicability within the Bulgarian VET sector, of student-centred approaches to teaching and learning. Quite whether such approaches will yield improved results in terms of student success achieved in a more cost-effective manner, and be more relevant in terms of meeting the needs of a changing economy, is unclear at present and in any case, this is not the focus of this research. What does seem clear is that teachers *throughout* the VET sector in Bulgaria should at least be exposed to the approaches currently seen as the norm by most of their Western European neighbours. If this were the case, what measures can be adopted to help ensure that the key features associated with the 'new' approaches to teaching and learning, are disseminated throughout the system? Rather inevitably perhaps, this would suggest a careful evaluation of existing methods of vocational teacher training in Bulgaria. This is likely to be most effectively undertaken by both those within the system and those whose interests they serve, possibly assisted by interested outside agencies. Whatever the results of such an evaluation, the outcomes must surely point to initiating reforms. The authorities concerned could do worse than consider what, if any, the impact of the staff development aspect of the UVET project has had on the schools involved. In terms of accurately measuring the success of the staff development, one question must be, are the teachers actually using student-centred strategies in their teaching? Furthermore, are the results positive? Whether they are or are not, a further question must be, what, if any, cultural and / or contextual factors have impacted on the transferability of the teaching and learning strategies presented?

Summary

This chapter has provided a detailed account of the author's involvement in the UVET project, as part of the overall Phare reform programme. Whilst one can see clearly the enthusiasm of the participants to embrace the 'new' strategies, the author has identified a number of issues that may prove crucial to the overall success of the project.

Essentially, these are the key issues that need to be addressed before any accurate assessment of the medium to long - term success of the staff development aspect of the project can be measured. As such, they form the key focus for the remaining sections of this thesis. Having provided the background to the research, at this stage it will now be necessary to review the literature associated with the key concepts relating to the research.

CHAPTER 4

LITERATURE REVIEW

As a guide for the reader, the author has arranged the literature review around five broad themes relating to the key concepts and approaches discussed in the research. These themes are:

- **transition and the role of the donor agencies**
- **the link between education, employment and the economy – human capital theory**
- **globalisation and exporting education - a threat to culture?**
- **teaching training and learning: new initiatives, new strategies and old traditions**
- **review of the Project Evaluation Documentation**

A discussion of the literature relating to the research methodology is contained in Chapter Five.

Transition and the Role of the Donor Agencies

Educational reform can manifest itself in many ways. The reasons for such reforms, equally, can be many and varied. Rich, for example, assumes that generally one thinks the purpose of reform is to:

“...amend what is defective.” (Rich, 1985 p2)

Whilst such a sweeping statement does not provide a full (or accurate) picture, it is true to say that reform is clearly about improvement. King, in referring to a policy analysis by the World Bank at the time, is of the same opinion:

“...the improvement of existing systems rather than scrapping them and starting again.”(King, 1991 p83)

This view is not shared by Shaw however:

"...the collapse of the Eastern bloc presented newly established nations with the task of totally reconstructing their education and training systems." (Shaw, 1999 p137)

Whilst there may be some divergence of opinion as to the extent of change needed during reform of education systems, it is clear that change they must. The actual reasons for reform are less clear. Fluitman (1998) identifies three 'roots' of VET reform: concerns about its relevance, its effectiveness and budgetary constraints. Whilst there is an undoubted logic to this, it fails to credit political ideology and will as perhaps the main root of reform. In fact one of the World Bank's key determinants regarding their lending strategy in Europe and Central Asia (ECA)¹⁵ is based on a country's will to change (World Bank, 1999). From a practical viewpoint, there can be little argument that the main driving force behind educational reform, or at least the nature of the reform, in developing countries and countries in transition, is the prevailing policy of the major Western donor agencies (Bennel & Pearce, 1998; Vachudova, 1997). On the other hand, the force 'from within' driving the need for reform, is the rapidly changing economic landscape. Certainly, donor policies can be seen to have been the main driving forces behind reforms in the former Communist countries of CEE. Yet interestingly, as King points out:

"...the World Bank, has been disproportionately influential in comparison with their contribution to total educational expenditure." (King, 1991 p ix)

However, reflecting the changes in the World Bank's operation in the decade since King wrote the above, Mundy observes:

" It (World Bank) emerged as not only the largest single provider of educational development expertise and concessional finance – but also as the only international organisation with a near-to-plausible concentration of ambition, power and resources for co-ordinating global initiatives in the field of educational development." (Mundy, 2002 p483)

Current World Bank policy regarding VET in the countries of ECA focus on reforming:

¹⁵ Geographically, Bulgaria is considered by the EU to be one of the countries of CEE but The World Bank's geographical description covers a wider area, hence the term ECA. The term ECA will only be used when referring to World Bank policies.

“... the concepts, expectations, rules of the game, incentives and capacities that structure the behaviour of players in the sector.” (World Bank ECA Sector Brief, 2000 p2)

It has already been pointed out that one of the World Bank's key determinants regarding lending success, is a will to change. The other, as indicated by the quote above, is organizational capacity. They do accept that there are often very concrete needs, that undoubtedly require support, but they insist that rationalization of finances must be the key (World Bank, 2000). Notwithstanding King's comments above, between 1984 and 1999 the World Bank contributed over \$230 million towards VET reform in the upper secondary sector in the countries of ECA. Even still, this only amounted to 14% of the total contributions to ECA. Whatever the figures, it is clear that the World Bank is influential in determining the direction of educational reform in developing countries. Bennell & Pearce (1998) support this view.

“ Differences in national educational policies also narrowed significantly during the last decade. in particular among poorer developing countries where the global policy prescriptions of the World Bank hold sway. ” (Bennell & Pearce, 1998 p3)

In a recent special edition of The International Journal of Educational Development (no. 22, 2002) devoted to the World Bank and educational development, several writers underline the impact that they (World Bank) have on educational reform. In reviewing the Bank's 1999 Educational Sector Strategy, for example, Soudien (2002) points out that they have now shifted their focus from 'hardware' to 'software' in terms of their lending policies. The 'software' being such things as curriculum development and the introduction of 'innovative' delivery mechanisms, for example, as opposed to the supply of equipment. In the same edition however, Mundy (2002) claims that there is an apparent lack of certainty and agreement between Bank staff as to the direction their education policy is headed. In terms of the specific relevance to this study however, she states that:

“ Much of the success of the Bank's educational sector lending in this period (1990 – 1995) can be attributed to the institutionalisation of a standard model for educational reform and educational investment across Bank programmes. ” (Mundy, 2002 p493).

However, by the time of the Bank's Educational Sector Review of 1999, Soudien (2002) referring to the educational programmes that they would support, claims that they had moved to a commitment to:

"...interpreting the context in which it seeks to operate." (Soudien, 2002 p446).

Whatever the actuality is, one thing is certain, the lending policies of the World Bank do not always force change. Particularly in CEE. Reporting on the state of education and the labour market during the transitional period, in Moldova and other countries of the region, including Byelorussia, Lithuania, Romania and the Ukraine, Kitaev (1999) observes.

" Their education systems remain conservative and resist radical change whether in orientation or management. Despite insistent recommendations of the World Bank, not a single higher or professional education institution has been closed in recent years, only a few have been reorganized or modified their profiles, and the majority continue to supply large numbers of engineers, technicians or agronomists no longer needed by the changing patterns of their transitional economies." (Kitaev, 1999, p6).

In terms of the UK's contribution to the EU, as a multilateral donor, the Department for International Development (DFID) contribute 15% of total EC aid resources, the second largest within the EU. This accounts for 30% of the DFID budget. Within the donor community as a whole, the UK is the sixth largest bilateral donor (DFID 1998). However, whilst the EU has a clear policy on VET reform in CEE, the DFID's key policies lie elsewhere. Principally, their policies focus on basic and primary education for all, in keeping with the internationally agreed target to halve the number of people living in extreme poverty by 2015.¹⁶

In a recent Country Strategy Paper on Bulgaria, which sets out their development targets for the country, the DFID (1999) identify poverty as the biggest problem in Bulgaria. Despite the report containing detailed comments about challenges to the economy, and political, social and environmental problems faced by the country, there is no mention of education, let alone VET and the role it could play in both the

¹⁶ The Secretary of State for International Development at the time, Clare Short, reiterated the government's commitment to this target, which was set out in their 1997 White Paper on International Development, in a speech at the University of Nottingham in November 1999.

medium and long-term alleviation of poverty. The stark figures given in their programme expenditure profile attest to the apparent 'downgrading' that education has been given by DFID. The last time any financial aid was allocated to any educational project in Bulgaria was 1998/99 and amounted to £0.04 million. Education does not feature in subsequent years nor for the immediate future years (DFID, 1999). It seems clear from this that DFID see VET and education in general, as a domain for their multilateral activity.

Ironically, in a DFID commissioned report on 'Teacher Job Satisfaction in Developing Countries (Garrett, 1999), the report refers to the views of the DFID itself in the 1997 White Paper on 'Eliminating World Poverty' and it states that the DFID:

"...has clearly emphasized the need for good education as a major component in its overall aim of poverty elimination..." (Garrett, 1999 p 1)

The World Bank's strategy position regarding Bulgaria does include a continuing support for education in general but indicates that widespread reform of public administration systems is a necessary precursor to quickening the pace and deepening the quality of reforms (DFID, 1999).

Ever since the collapse of communism across the countries of CEE, there has been a rush to join the EU. This resulted in the EU signing a series of 'Europe Agreements' with the former communist countries. In essence, these provided for economic, political and cultural cooperation. The main purpose of this was to prepare these countries for joining the EU. In June of 1993, the Heads of State of the EU countries decided that the applicant states in CEE:

"... can become members as soon as they satisfy the economic and political conditions for accession..." (EU Directorate General X, 1998, Europe Agreements p5)

The conditions were wide ranging including areas of democracy and the rule of law, respect for human rights and a workable market economy. To assist this transition, pre-accession strategies were drawn up by Heads of State leading to regular structured

dialogue and meetings (EC, 1998). The financial aid essential to the process was provided through the EU's PHARE programme.

In comparison to the World Bank's support to CEE, outlined above, the EU's support appears positively grand. Although at the time of writing figures specifically relating to VET are not available, the EU, through its PHARE programme, between 1990 and 1995 made a total of 5.417 billion ECUs available to these countries to process economic transformation and strengthen democracy (EC, 1998). From 2000 to 2006 the total budget allocated to PHARE projects is 1.560 billion Euros (EC, 2001). Considering that the PHARE UVET project that forms the focus of this study had a budget of 3.7 million EUROS, which was quite modest compared to other projects under the PHARE programme, it is clear that the EU's financial commitment to VET, indeed to ECA / CEE development as a whole, is quite significant. With finance like this available it is not surprising to learn that the EU and its fifteen member states provides more than 50% of world development aid. In 1995 this approximated to 0.38% of EU per capita GNP, which is well above the 0.27% represented by the donor assistance community as a whole (UNESCO, 1998). Of course financial support of this magnitude does not come without conditions.

The Link Between Education, Employment and The Economy – Human Capital Theory

Whilst it is impossible to ignore the role of the donor agencies in the reform process in the countries of CEE, as far as VET is concerned at least, recipient governments in these countries are unlikely to be opposed to the direction of 'recommended' reforms. Governments in these countries will be only too aware that agency policies are largely determined by issues related to employment opportunities. With conventional wisdom in the countries of the OECD suggesting that there is a link between education and the economy, it is no surprise to find the former communist countries, with their crippled economies, welcoming with open arms, policies that may enable them to emulate the growth experienced by OECD countries. This is echoed by Finegold (1992) who states that economic change has been the driving force behind the reform movement. With the days of unemployment being structurally non-existent under Communism

long since gone, the collapse of much of the state-controlled industry in these countries is creating hitherto unknown problems of unemployment. The trend in the West for employable and transferable skills and qualifications, and the perceived success of this approach, will certainly have been picked up on by observers from within the countries of CEE.

There is little doubt today that planned investment in the 'development of people' through education and training can not only improve the individual's lot in society but also improve society as a whole. In essence, this is the premise upon which 'human capital theory' is based. The author is acutely aware of the large volume of literature that exists in this particular area, however, in order to keep within the confines of this particular research, only selected texts relevant to the overall focus of the research have been selected for inclusion here.

Sweetland (1996) suggests that investment of the above kind, benefits both individuals and society in terms of an improved economy. It is the link between the economy and education that defines human capital theory. The OECD define human capital as:

"...the knowledge, skills, competencies and other attributes embodied in individuals that are relevant to economic activity."(OECD, 1998 p9)

Sweetland (1996) underlines the importance of human capital theory by referring to the impressive record of publications identified by Blaug (1970 in Sweetland, 1996) over a four year period in which 120 per year were recorded including works by no less than five Nobel prize-winners. Although the link between education and the economy is not a new concept¹⁷, it was only in the 1950s and 1960s that the concept of human capital became popular through the studies of people such as Mincer (1958), Becker (1960), Schultz and Dennison (1960), Mills and Marshall; and Fisher (in Sweetland, 1996). Although Becker and Fisher both highlighted the problems of making clear and unambiguous links between investment and return in education, Schultz and Dennison (1960 in Psacharopolous and Woodhall, 1997) showed that

¹⁷ Adam Smith published an inquiry into 'national wealth' as far back as 1776 in which he identified education and experience as capital (in Sweetland 1996).

education contributes directly to the growth of national income by improving the skills of the labour force. Sweetland, in his study of the human capital theorists has no reservations, declaring:

“...all of the studies discussed collectively verify human capital theory: individuals and society derive economic benefits from investments in people.” (Sweetland, 1996 p351)

It is unlikely if the donor community at large would ever have invested so heavily in education in developing countries if they had not accepted the view that it can make a difference. The World Bank adjusted its focus from the directly productive sections of the economy to human capital during the shift in thinking in the 1960s. The World Bank has continued to apply a cost-benefit approach to any proposed investment in human capital, by considering any proposal where the expected benefits to either individuals or society are greater than the actual costs, to be worthwhile. In a World Bank sponsored analysis of investment choices in relation to education and development, the authors underline the importance attached to investment in education:

“ Education, like other forms of investment in human capital, can contribute to economic development and raise incomes of the poor just as much as investment in physical capital such as transport, communications, power and irrigation.” (Psacharopoulous and Woodhall, 1997 p3)

Research undertaken by the OECD (1998) has shown that to possess a tertiary qualification in the membership countries is likely to halve the time an adult spends unemployed, when compared to leaving education without a secondary qualification. The research goes on to suggest that possessing such a qualification can add ten years to the amount of time spent employed over a working life. Whilst there is no telling if this can be reflected in CEE, given the different conditions and context, the ETF (1999), referring to the countries of CEE, are also of the opinion that better educated people are less likely to face unemployment.

Although, as pointed out above, the link between education and the economy appears incontestable, it is by no means a universal view (Parizek in Philips & Kaser, 1992; Finegold, 1992). For example Finegold states:

“...it has proved difficult to demonstrate theoretically or empirically the relationship between education and training and an economic organisation’s performance.” (Finegold, 1992 p57)

The OECD is in doubt however:

“ In an environment in which knowledge increasingly forms the basis of economic growth, education assumes strategic significance. It is central to the continued development of societies and represents one major solution to the unemployment issue. The development of a skilled labour force essentially affects the supply side of the labour market, and must be associated with other policies that improve the ability of the labour market and to adjust to structural change and foster sustainable economic growth.” (OECD, 2000 p9)

Since the onset of reforms in the countries of CEE, the ETF (1999d), have found that educational attainment levels of the population overall are improving due to the fact that more people are actually gaining a minimum secondary level qualification. As far as Bulgaria is concerned, according to the latest ETF Key Indicators for VET Report (1999d), they have one of the highest numbers of highly qualified people (19% of the population) amongst CEE countries, yet conversely, along with Hungary, they have the lowest % ‘activity’ rates (46% of the population). These figures are based on activity rates in post-compulsory VET however which does not account for young people who are still in the education system. A worrying trend for Bulgaria, highlighted by the ETF Report, is that in an analysis of 15 yr. olds in education, it shows that every year, 15% of them drop out of education. This is higher than all the other CEE countries and is an increasing figure unlike the other countries where the number is actually dropping. In a poor reflection on the effectiveness of VET provision in Bulgaria, the Report shows that the annual drop-out from VET is between 2.4 – 14%. It can be no coincidence that spending on VET in Bulgaria is lower than in all the other CEE countries – 0.35% of GDP in 1997 (ETF 1999d).

In ‘bucking the trend’ of what is happening in other CEE countries where investment and drop-out rates are concerned, if seen in isolation, could be interpreted as a move

against the norm of globalisation policies. This is unlikely however given the wider picture, but it does raise questions of commitment to change. Perhaps the unprecedented and to some extent unchecked march of globalisation itself is seen as a threat. If so, one must question in what sense is globalisation seen as a threat and to what extent can and should Bulgaria resist change?

Globalisation and Exporting Education - A Threat To Culture?

Globalisation in terms of the worldwide exchange of goods and technology is not new. One needs only to study the development of colonialism by the great world powers of the nineteenth century to confirm this. However, at the dawning of the twenty-first century the concept of globalisation is developing faster and further than at any other time. Hallak (1998) defines globalisation as:

“...a combination of much freer trade in goods and services combined with free capital movements.” (Hallak in Poisson, 1998 p1)

What has brought this about of course is the dramatic developments over recent years of information and communication technology (ICT). Such developments have far reaching consequences in practically all aspects of life. As a recent UNDP report on technical cooperation points out, globalisation is creating an increasingly interdependent world. The report goes on to describe the ‘altered dynamics’ of international cooperation in the 1990’s:

“...the rapid globalization of markets and production structures, accentuated by an increased emphasis on the creation of a liberalized international trading regime, has presented special challenges and opportunities to the developing countries. Similarly, the creation of a number of new states from the former Soviet Union and parts of Eastern Europe has imposed new demands on the international community...” (UNDP, 2000)

The report also identifies the rise of the new economic power centres in the South, for example: East Asia, and Latin America. Soudien (2002) identifies Mexico, Brazil, South Korea and Malaysia as examples of these emerging economies. Yet even in these recently strong economies, global developments have impacted on them. Korea is a good example. A recent report by the Korean Research Institute for VET

(KRIVET) on reform and innovation of VET in Korea identifies it as being pivotal to the rapid industrialization process over the past 30 years. Despite a strong performing economy over these years, it now needs to change again:

"...the country now faces new challenges posed by the changing global economic environment". (KRIVET, 2000 p1)

Just as the politicians of Western governments recognised a decade and a half ago the need to reform their national education and training systems to bring them in line with new national and global socio-economic requirements (Shaw, 1999), politicians in the transitional countries of CEE have now, over the past few years, accepted that they must do the same. It was inevitable perhaps, that in looking at the relatively buoyant economies of the West, politicians from the countries of CEE would seek to emulate these countries, at least in ways that could turn their own broken economies around. Some observers recognized this even before the final death throes of communism had commenced. Writing a decade ago about Bulgaria, Tchukov, in a more complete form of an earlier used quote, noted:

"This leaves them with 2,200 uncompetitive state enterprises which are at best uncompetitive with similar western firms, or at worst hopelessly riddled with corruption and inefficiency, run by managers who either have no understanding of incentives or the profit motive, or who have grasped these concepts only in the context of their own enrichment." (Tchukov, 1990 p24)

The above writer was in no doubt whatsoever that the key to Bulgaria's future prosperity, in terms of a successful transition to a democratic society, lay in seeking help from Western governments.

" The transition to such an economy is bedevilled by a sheer lack of experience across a whole range of activities...the idea of democratic accountability has still to be grasped by both politicians and bureaucrats...these are essential if large-scale foreign investment and participation in joint ventures are to be attracted. If the West wishes to encourage these trends it should lose no time in making its administrative expertise available to Bulgarian leaders and managers at all levels, in business, the professions, government, the trades unions, or academia. The seconding of Western personnel in these areas and the organizing of training for Bulgarians in the west itself could all play a part in the re-education of an elite upon whom the future of Bulgaria crucially depends." (Ibid, p25)

Of course since these observations were made, there has been massive investment and development aid to Bulgaria. Given the title of the study that spawned the above comments: 'Still in the Queue – Bulgaria waits for democracy' (Tchukov, 1990), one cannot help wondering, that barely a year after the moves towards a more democratic society had begun, to have expected any dramatic developments was perhaps being a little too ambitious.

For every commentator who considers Western help in the form of expertise, financial support, advice and know-how as desirable, there are an equal number who urge constraint. Not without good reason. The developing world is littered with examples of failed projects. Writing over three decades ago, Zack summarized the problem well.

"...there developed, particularly in the British colonies, a course of study that trained Africans for European school examinations in courses having little relevance or interest to Africans in terms of their own needs". (Zack in Elliot, 1967 p134)

Even twenty-five years later, King (1991) claimed that much of the work on education in developing countries up to that time was still unsuccessful, citing the fact that much of it was based on literature and research on educational trends carried out by consultants and agencies from Northern¹⁸ countries, where:

" Inevitably, a good deal of cultural baggage is carried south." (King, 1991 p278)

Forgetting about 'the cultural baggage' for a moment, one may also question on what basis so called educational experts and consultants from Northern countries were recruited to advise and develop policy and projects. According to King:

" What adds up to education in our own country is as confused a tangle as any to be found in these other countries where we more easily assume the role of critical advisors." (King, E. in Grant, 1969 p xiii).

¹⁸ This is another loose geographical description which identifies the 'developed' and industrialised nations of the world.

Things may have changed somewhat since those observations were made but there is still some truth in the sentiments expressed. In terms of the actual shortcomings of research and aid projects and the resultant courses and programmes, these are further summarised by Smith:

"...some factors that do not always appear to be taken into consideration when planning policy for aid projects in developing countries, in particular, ...contextual and cultural issues associated with implementing Western technology and all that it entails. This is also of course true in relation to Western education systems, and in particular, those concerned with VET. The principles and mores, the philosophy and attitudes upon which VET is based in New York state is, in all probability, likely to be somewhat different to those expected in Manchester, England. On this basis, what scale the differences underpinning VET between both these places and what may be reasonably expected in a small town in sub-Saharan Africa?" (Smith, 1997 p7)

Whilst it may be tempting to export a tried and tested and relatively successful system of VET from one country to another, it is likely to be doomed to failure unless sufficient account is taken of cultural and contextual factors. The Germans for example have resisted the temptation to export their successful dual system of VET (King, 1991), although much earlier, after the War, they did see their technical schools as exportable products, particularly in China.

Unlike many developing countries who, initially at least, remained open to ideas and broadly embraced the advice and technical assistance from the West, China tried to remain closed to much of the Western influence for fear of absorbing 'decadent ideas'. The case of China and the role of foreign experts in the development of their universities provides a perfect example of different cultures colliding head on. On the one hand we have the pluralist, democratic and free-market thinking of the UK providing the background to UK academic thought and processes, facing up to the single-school of Marxist economic theory and philosophy that forms the basis of Chinese academic and government thought.

In support programmes and exchanges with Western academics, the Chinese authorities, whilst eager to learn Western techniques for their usefulness to their economy, steadfastly refused to allow anything that they thought might influence their socio-political structure (Ju, 1992). Thus, although China was committed to opening

up to the outside world and inviting exchanges with foreign countries, it was purely for pragmatic reasons in the hope of getting quick applications of know-how. According to Ju, who traced these developments from 1978, the results were less than successful:

"...the outcome of foreign experts' classes has proved that technological learning and cultural learning are interrelated. The Chinese effort to view the two separately has bred more confusion than clarification." (Ju, 1992 p359)

He goes on to describe the problems associated with learning Western science and technology in isolation from its social and ideological context. Stating that:

"...foreign experts have not been fully supported in their efforts to introduce the alternatives into the Chinese classes." (Ibid, 1992 p352)

"... and the failure to integrate foreign experts into the Chinese academic community." (Ibid, 1992 p353)

In the above case, the concerted attempt to try and receive the wisdom and know-how of the West without understanding or wanting to be exposed to the accompanying 'cultural baggage' associated with it proved problematic. However, Froyland (1990) identifies a different slant on the problem of foreign 'experts'. Reviewing the role of Swedish expatriate 'technical assistance personnel' (TAP) working on an institutional development project in a vocational college in Tanzania, he identified a number of crucial factors which, ultimately, proved detrimental to the planned sustainability of such projects. The expatriates were originally brought in to help in the development of vocational technical centres. Although it was intended that 'counterpart' staff development would form part of the work, a combination of language problems and lack of staff development skills resulted in the TAP simply 'doing the job', because it was easier than training the local staff to do it. In a more wide-ranging evaluation about Swedish aid projects in the country, Lauglo observed:

"...expatriate and local staff have shared the work to be done without paying much attention to knowledge transfer or staff development." (Lauglo, 1990 p139)

He also noted that, like expatriates in other countries, they tended to stay together with little socialising with Tanzanian colleagues (Lauglo, 1990). The kind of VET development projects Swedes and other Scandinavian countries were (and indeed still are) involved in, in Africa particularly, are largely concerned with institution building and sustainability based around a country's own curriculum and examination system. Over recent years however, with the globalisation of the economy, there has been a growing recognition that perhaps a more internationally recognized award system may be more useful:

"...in many other areas of management and technical competence, internationally recognized and negotiable qualifications are needed for recruitment and promotion purposes." (Bennel & Pearce, 1998 p3)

The above authors also identify that the UK and Australia have become 'market leaders' in developing overseas-validated courses, particularly in the English speaking developing countries. Whilst Africa has been associated with sending students to the UK for many years as part of development projects, it is only relatively recently that award bearing courses have been run in-country. Indeed the author has just been involved in one such project in which an undergraduate programme was successfully delivered in Zambia. Whilst the main reasons for running in-country courses are largely financial, the in-country hosts may also see other benefits. As Bennel and Pearce point out:

"...not only are foreign exchange savings very considerable but by not having to study overseas, students are less likely to be adversely influenced by 'Western culture' and loss of skilled personnel overseas as part of the brain drain is considerably minimised." (Bennel & Pearce, 1998 p22)

Of course the potential problems associated with cultural transfer still exist, but at the end of the day, in the above scenario, the net result will be, for example, African students gaining a UK, or other country's internationally recognized award and the knowledge and know-how that goes along with that. Whether contextually appropriate or not, the impact on the host country's education system is, arguably, minimal. However, in terms of 'cultural imperialism' there are more worrying trends.

“ The scope for exporting entire national vocational qualification systems has also begun to be recognized. In 1997 an International Vocational Training Unit was established by the UK’s Department for Education and Employment (DFEE) with the overall goal of promoting the use of NVQs. By early 1998 Oman had already adopted NVQs and some South American countries were also interested.” (Bennel & Pearce, 1998 p18)

Quite apart from the potential cultural and contextual problems associated with such ventures, some argue that there are ethical problems to address. Using NVQs as an example, this award and the associated support and delivery structure, has come in for much criticism over the years (Jarvis, 1992; Prais in Hyland, 1998; Hyland, 1994, 1998; Smithers, 1993). Hyland is particularly scathing.

“...so Britain is currently trying to sell a failed and discredited NVQ system to unsuspecting overseas countries. It is important that such activities are challenged and criticized both in the interests of professional ethics in VET practice...” (Hyland, 1998 p370)

Certainly Western countries, Britain included, would be wise to look very carefully at their own VET systems before considering them as export commodities. ‘Adapted’ systems may be a preferable, in which considerable account has been taken of contextual and cultural factors to tailor the VET system to local and national needs. It could be argued however, that to import a flawed system is preferable to being sidelined and disadvantaged in global development terms. In fact some go further and challenge the notion that globalisation poses any threat.

“ Does globalisation pose a threat to continuing cultural diversity? – Are not the new patterns of behaviour required for adapting to globalisation (and which are only available through education based on a Western model ie. A model which is foreign to the unique values of other regions of the world ?” (Poisson, 1998 p2)

Whilst researchers in the West debate and agonise over the ethics and applicability of exporting flawed systems and concepts of VET to developing countries, in the relative affluence and comfort of academia, potential recipient countries may be suffering the consequences of having much worse systems in place.

As far as CEE is concerned, globalisation is more about meeting EU standards, as part of the accession agreements. In fact, as far as VET goes, after fruitless attempts over

the years, the EU long ago gave up the idea of having 'pan – European standards', they do not exist. The EU is now more concerned with 'harmonisation'. Whilst the political will to change and integrate between member states' systems and standards does not appear to exist, there is much similarity. As Shaw points out:

"...the gradual emergence of a considerable degree of convergence in terms of trends in VET across EU Member States and the firm conviction on the part of aspirants for accession to the EU that there is such a thing as 'European standards and that to achieve these is a precondition for being allowed to join the European Club.'" (Shaw, 1999 p 139)

Whilst this may be the case the actual desirability of 'global convergence' is still questionable (McLean, 1995).

There can be little doubt however, that achieving some degree of 'harmonisation' with what is going on in Western Europe is crucial to the progress of the countries of CEE. McLean (1995) also concedes that economic convergence can co-exist with cultural diversity. However, he also observes:

"...traditions may be strengthened or weakened by cross-fertilization but the process by which some imports are welcomed and others not are mysterious." (McLean, 1995 p172)

In terms of adopting a strategy to avoid potential problems arising out of cultural differences, Shaw urges that the countries of CEE should be reminded that:

"...there are, indeed opportunities to position themselves between and amongst a variety of Western VET models in order to provide the best blend with their own cultures, traditions, possibilities and needs." (Shaw, 1999 p137)

Few people are likely to disagree with such advice. Indeed, with the EU having long ago abandoned the idea of universal qualifications, there is no mandatory requirement for the countries of CEE to adopt Western qualification systems. In working towards one of their key aims, the free movement of people within the Union, the EU's underlying principle in that respect is one of trust. The proposed outcome being the principle that a person should be able to practice his / her profession in a member state other than the one in which the qualification was awarded, if so desired. The ETF, in

commenting on the EU directive that outlines the above principle (Council Directive 92/51/EEC), state:

"...underlying principle is that of mutual trust and the directives, therefore require no harmonization of national education and training programmes." (ETF, 1999b p2)

The reality however is quite different. Whether mandatory or not, Western qualifications, whatever the criticisms from within the countries where they originate, are seen as the 'gold standard' by most of the countries of CEE. Furthermore, regardless of the interpretation of Directive 92/51/EEC, in terms of 'mutual trust', as McLean points out:

"...the means of comparing educational attainment across countries has doubtful reliability." (McLean, 1995 p5)

Conflicting views and prevarication by academics and those not immediately affected, on the appropriateness or otherwise of importing or adopting VET systems or principles, for whatever reasons, may be cold comfort to the actual people who are likely to benefit from VET reform. This should in no way however, prevent careful consideration of the implications of Western influence on VET reform. At the heart of any reform programme is the actual curriculum. Quite how much detailed research and attention has been given to the curriculum development process in recent reform programmes is open to some debate. In a recent cross-country analysis of curricular reform in VET in CEE, carried out by the ETF, it was found that:

"...the underpinning philosophies of the Phare curricular reforms, contained in their terms of reference, have been transferred from West to East without sufficient consideration of the transformation contexts...." (Parkes et al, 1999 p7)

"The curriculum values prescribed by Phare vocational training programmes set an ideological agenda which reflects, at least, the implicit value system embraced by EU funding countries and largely accepted by partner countries' PMUs¹⁹." (Ibid, p13)

If the key determinants of reform revolve around labour markets, skill demands and the economy, somewhere along the line the actual people charged with implementing

¹⁹ Project Management Unit

any reforms should be considered...the teachers and trainers and the students and trainees themselves

Teaching, Training and Learning: New Initiatives, New Strategies and Old Traditions

To attempt to cover the developments in approaches to teaching and learning that have taken place over the past few decades of expansion in vocational education and training would not only take up at least another volume, but would be outside the scope of this research. Rather, this particular section is going to consider some of the literature relating to the two key themes associated with approaches to introducing 'innovative' teaching and learning strategies into the Bulgarian VET system, notably competency-based training and student-centred learning. Reference has already been made, of course, to these concepts earlier in the work, but this section will attempt to bring some of the wider views together.

We live in an era of change. Some would go further and say we exist in a permanent state of flux. This somewhat contradictory term does however sum up the state of vocational education and training in the twenty-first century. In the UK, from the mid 1970s to the present day, a plethora of regular 'new' initiatives foisted onto the post-compulsory education sector has had a significant impact on developments in this area:

"Since the mid 1970's, education and training reform has emerged as a major political issue in most of the advanced industrial countries. In Britain, the origins of the dramatic changes that have flowed almost continuously over the last decades..."
(Finegold et al, 1992 p57)

The 'origins' referred to above, is in fact James Callaghan's famous Ruskin College speech in 1976, in which he criticised the education and training system for failing to meet the needs of industry (Finegold et al 1992). From the days of the Manpower Services Commission (MSC) and its initiatives aimed at providing school leavers of largely low academic achievement with skills for the workplace, teachers in the sector have had to come to terms with a range of new approaches to cater for a more diverse

student population. These initiatives include such things as the 'Training Opportunities' (TOPS), and 'Youth Opportunities' (YOPS) schemes, culminating in the much derided, in its day, of the Youth Training Scheme (YTS). The YTS was introduced as a result of the Conservative government's 'New Training Initiative' White Paper of 1981. Criticised by opposition groups as a means of reducing the official unemployment figures which were spiralling out of control at the time, this initiative was however to prove a major milestone in vocational education and training in the UK, and beyond. However, even by 1988, such initiatives had little impact. As Richardson et al (1993) point out:

"Up until 1988, Britain was one of the only advanced industrial countries where a majority of 16-year olds left education at the first opportunity" (Richardson et al, 1993 p38)

The 1981 White Paper however paved the way for the establishment some years later of the National Council for Vocational Qualifications (NCVQ), which oversaw the introduction of National Vocational Qualifications (NVQs). This so-called 'training revolution' (Jessup 1991) heralded the reform of vocational education in the UK. Effectively, it resulted in the move from traditional, time-served approaches to training, to performance /competency based training for most practical / industrial and commercial occupations. Occupational courses, in response to calls for shorter training times from employers, changed from being based on a 'time-served' apprenticeship to one in which trainees can progress on the basis of how quickly they can provide evidence of competency in various tasks. The new practices and procedures associated with the introduction of CBT were not generally welcomed by the sector at the time and a chorus of growing criticism during the early years of CBT (for example Hyland 1994; Smithers 1993; Stevenson 1992, etc.) led to a number of studies being commissioned to assess the impact of these reforms. The author himself was commissioned by the Further Education Unit (FEU now the Further Education Development Agency, FEDA) to carry out one such study (Smith, 1994). The FEU were in fact themselves commissioned to carry out the studies by the Further Education Funding Council (FEFC). The resultant publication: 'NVQs in the FE Sector in England' (1994) presented a rather 'watered down' criticism of NVQs.

Whilst the *main* concern of this research is not specifically with the relative merits and limitations of CBT, or indeed the introduction of any of the associated 'new and innovative' approaches to teaching and learning per se, reference to some of the issues of contention is nevertheless essential. One must however bear in mind that the main focus of the research is concerned both with factors associated with how / whether such reforms have been accepted and implemented within the Bulgarian VET system, and also, more importantly, the contextual and / or cultural factors that have impacted on implementation.

The initial, *and continuing*, criticism related to VET and the introduction of CBT centres around the move away from a theoretically dominated curriculum to one almost entirely focused on practical performance to industry set standards. In fact competency schemes rely not so much on a curriculum but rather a set of 'competency statements' in which industry-set standards must be met. The 'lack' of a traditional curriculum or course structure is in itself the source of problems.

"Competency standards of whatever type can hinder course development if the competency standards are confused with a curriculum document". (Hager, 1995 p145)

he does however go on to say that flexible teaching could be introduced since there is no prescribed course structure with CBT. Whilst industry standards can of course be seen to be useful, the implementation of standards Europe-wide may be more problematic. Yet in essence, this is precisely what the EU candidate countries, including Bulgaria, are facing up to. However, as we have seen, as far as VET is concerned, there is no agreement on what such standards should be. Shaw (1999) concludes that there are no pan-European standards and that even if they were formulated, there would be little political will to implement them.

With the focus being on 'product' or outcomes orientated, rather than process, this has resulted in CBT being criticised for being assessment driven. The limitations of such an approach have been well rehearsed over the years (Erridge & Perry, 1994; James & Coleman, 1998; Hager, 1995; Rolie, 1996; Watson, 1994). In fact much of the debate has its origins in the great learning paradigm debates of the last century.

The main views in this debate were, in effect, polarised between the behaviourists on the one hand and the humanists or cognitivists on the other. The behaviourists, whose main theorists included the American psychologists John Watson, Edward Thorndike and B.F. Skinner amongst their number, believed that learning was based on the links between stimulus and response. Even in the present day much of what goes on in schools is based around this simple premise. This very mechanistic and reductionist approach can be seen in CBT. On the other hand the student-centred learning component of CBT, which encompasses experiential and active learning both individually and in groups can be seen to have its origins in the humanist tradition which was championed by the likes of John Dewey, Jean Piaget, Jerome Bruner and Carl Rogers. Unlike the 'passive receptor' approach of the behaviourists, the humanists see learners as the key actors in the process, in effect active seekers of knowledge (Child, 1997).

Hager (1995), in referring to the reductionist nature of CBT is concerned about the lack of attention to the wider aspects of competent performance, whilst Rolie underlines the difficulties and time-consuming nature of the assessment regime:

"...it (CBT) ignores attributes that underlie competent performance; it ignores group processes and their effect on performance; it omits the role of judgement in intelligent performance..." (Hager, 1995 p142)

"...the risk of breaking up the learning experience into small particles has concerned academics and practitioners. To ensure that all performance criteria have been met, the recording of decisions over hundreds of criteria may be necessary." (Rolie, 1996 p162)

Smith in James and Coleman (1998) asserts that the assessment processes associated with CBT actually disempowers students and increase their dependency on teachers rather than encouraging self-direction and autonomy, key principles in CBT. This is in direct contrast however, to the views of many educators:

"Globally, educators are increasingly encouraging student-centred instruction as one way to empower students". (Costello et al, 2002 p119)

Criticism of CBT from academics and practitioners has however seen successive reviews of the way the competency statements have been presented. An increasing emphasis on the desirability of acquiring the underpinning knowledge associated with performance is now widely accepted. Whilst the reductionist nature of CBT still has its critics, it is the manner in which the underpinning knowledge is to be gained that is of concern. Effectively, this is at the heart of this research, for we are talking about the introduction of student-centred learning. In essence, student-centred learning equates to the 'new and innovative' teaching and learning strategies that have been introduced into the Bulgarian VET system.

In simple terms, because in CBT the emphasis is on performance, most of the time available on courses leading to the acquisition of competence, is spent developing practical occupational skills, leaving little time for the teaching of theory. This has led to the widespread use of 'self-directed learning', utilizing self-learning resource packs for acquiring the underpinning knowledge component of the various tasks. For a fuller description of the differences between 'traditional' learning and 'student-centred' learning see Chapter 3. Thus students have to take on board much of the responsibility for their own learning. The degree of actual self-direction however is variable. In Australia for instance, this often simply translates into 'self-pacing' accompanied by teacher assistance (James and Coleman, 1998).

The reason why student-centred learning or self-directed learning is central to the success of CBT may be an instrumental one in terms of making 'better' use of available time, but such approaches were seen in many quarters as the crucial way forward for education and training.

"At the individual level there is increasing recognition of the need for people to take responsibility for their own learning, hence the notion of self-organised learning. Only when the individual has acquired the skills of self-organisation will they be equipped to fit into learning organisations within the learning society, and make a commitment to lifelong learning." (FEU/FEDA, 1995 p6)

"Teachers should help their students to develop robust learning skills and encourage them to become independent or self-organised learners." (Ibid, p7)

Whilst the champions of CBT could be forgiven for pointing to such august organisations comments as justification for the use of student-centred learning, as pointed out above, there is more than a hint of pragmatism about its use. The change in emphasis from 'teaching' to 'learning' is summed up well in the introduction to 'Models of Teaching' by Joyce et al (1992):

"Models of teaching are really models of learning. As we help students acquire information, ideas, skills, values, ways of thinking, and means of expressing themselves, we are also teaching them how to learn." (Joyce et al, 1992 p1)

When we talk about student-centred learning, this may give the impression that it relates solely to independent learning when in fact it incorporates much more than this. Whilst the ability to learn independently is a key component of student-centred learning, a range of other approaches in which students are actively engaged in the learning process, also forms part of what we can call 'innovative' learning and teaching methods. The reader can see that the term teaching is still in use here, for good reason.

"How teaching is conducted has a large impact on students abilities to educate themselves." (Joyce et al, 1992 p 1)

Such 'active' learning includes a range of strategies and methods. In their study of attitudes to student-centred learning in nurse education in England, Jinks et al (1998) categorised a range of such approaches, including: self-directed learning and teaching; experiential learning and teaching; problem solving learning and teaching; contract learning; reflective learning; negotiation; and, the development of critical thinking and self-directed learning skills (Jinks et al 1998 p 378). When CBT was first introduced into the Australian VET system, many of the approaches identified above were precisely the things that were actually seen lacking at that time.

"...because of the emphasis on observable outcomes to the exclusion of internal cognitive processes, less obvious, but important transferable skills arising from conceptualisation, learning how to learn, discovery, analysis, problem-solving and experimentation are likely to be left to chance." (Stevenson, 1992 p235)

Whilst it is debatable whether the strategies identified above could be described as 'innovative', as far as the Bulgarian VET system is concerned, given the very conservative and traditional nature of the system (Nielson 1999; Phipps et al in Watts & Walstad, 2002), they certainly can be described as such. Without wishing to enter into the semantics of the term 'innovative', it is nevertheless interesting to note the following interpretation of the term with regards to a study on the effective use of innovative teaching techniques in industrial training which could be found in both commercial environments and in institutions of further education:

"The Steering Committee agreed that innovations should be taken to be those concepts and/or activities which were novel to the users. The period of use before being excluded from the list should be about four years." (NCET, 1973 p3)

Regardless of the actual 'innovation' being introduced, Bates, in reference to his research on self-paced learning:

"...advised caution in developing innovatory forms of pedagogy, such as self-paced learning. For some student groups, teachers were placed in the position of either tightening control in order to assist students in passing, or insisting on student responsibility for outcomes and 'allowing' them to fail". (Bates in James & Coleman, 1998 p405)

Whilst this may indeed be the case in some situations, it is clearly not an approach that is in keeping with the spirit of student-centred learning. What does seem clear is that often both teachers and students have not been sufficiently trained or inducted into the most effective ways of implementing such innovatory approaches. For example, when initiating group work activities, Jacques points out:

"New lecturers are not often given suitable induction to group teaching. Even when training in small group techniques is given, it is not always easy to replicate the dynamic tension of a seminar in a training exercise". (Jacques, 2000 p vi)

In addition to this is the actual preferred learning style of students, a factor that is rarely taken into consideration, particularly when initiating groupwork exercises. Perhaps this is because relatively little research has been carried out into this area (James & Coleman, 1998). Although not specifically identified as a learning /

teaching method by Jinks, above, groupwork it is nevertheless one of the main strategies used in student-centred learning.

Groupwork is a preferred approach by many teachers and trainers because it has the potential for developing a range of social and life skills in relation to 'working with others' in teams. Research carried out by Sharon and Sachar (in Joyce et al 1992) showed that achievements of students taught in small groups exceeded those that were in whole group teaching situations. This is echoed by James & Coleman (1998) who found that teacher-led group discussion and small group work appeared to be the most valued approaches by teachers. However, as Jacques (2000) alludes to above, the dynamics of any group is likely to have an impact on the success or otherwise of the learning experience.

Learners can take on a range of roles, either consciously or unconsciously when working in teams or groups, that can seriously impact on how the group performs. Some people naturally have leadership tendencies for example whilst others are happy to be directed. When more than one leader emerges however, this may create problems. If we add to the mix other factors such as: gender; age; race; culture; social class; religion and language, not to mention previous learning experience (FEU/FEDA 1995), one can see the potential problems, as well as benefits, that may result.

Regarding an individual student's own learning style, Kolb et al (1979) originally identified four distinct learner styles: concrete experimenters; observer reflectors; abstract conceptualisers; and, active experimenters. In essence, Kolb suggests that for any learning experience to be effective and get the best out of the group / class, then the activities should be structured to cater for all these learner types. The simple fact of the matter is that not all students like to work in groups. The author has encountered on several occasions students that simply preferred to work individually.

Of course whatever learning / teaching approach is adopted must relate to what the desired outcome is. Whilst we talk about 'innovation' in teaching, there is still a place for the more traditional methods. Bligh, in Lammers & Murphy (2002) for example:

“...conducted a comprehensive review of the effectiveness of lecture compared with other techniques and concluded that lectures were approximately equivalent with other methods to teach information, but were often less effective for promoting thought, changing attitudes and developing behavioural skills.” (Bligh in Lammers & Murphy, 2002 p55)

So it is not just a case of using ‘innovatory’ techniques because they are innovatory, rather, one must consider the skills and competencies that are to be developed. In terms of the traditional VET system that has existed in Bulgaria for many years, perhaps lecturing has been the most effective means of building up students knowledge. However, to develop the other skills that are now seen as being at least as important as knowledge acquisition, may require more than was previously thought in terms of changing teachers attitudes and perceptions.

Having reviewed literature related to some of the key concepts investigated in this thesis, the author now turns his attention to reviewing key project evaluation documentation.

Review of the Project Evaluation Documentation

Three key documents have been published since the completion of the project. The first, published in February 2000 by the Swedish consultancy organisation AMU Gruppen, was an evaluation of the whole of the PHARE /VETEREST programme. The second, published by the British Council in June 2000, was a case study concerned only with the UVET component of the programme. The third is the Project Final Report published by The British Council. This document is undated. For the purposes of this review, the author will consider each publication separately, and then identify key areas of convergence in relation to the research.

1. AMU Gruppen (2000) - Evaluation of PHARE VET Programme BG 95.06

“ Teaching has changed. It is now more of a learning-teaching partnership between students and teachers.” (pilot school student p2)

“ The new teaching method is not during the class, but all about preparation. We learned to say, we do not know everything about teaching.” (pilot school teacher p2)

Both of these verbatim quotes featured in the report tell the same story – that the learning / teaching process has changed. What it does not tell us, is the precise nature of the change. More importantly for the author, it is difficult to judge whether such changes are the result of that teacher’s attendance on the ‘innovative learning and teaching strategies’ seminars, attendance on staff development seminars associated with another component of the project, (Teachers Career Path), or, as a result of ‘cascading’ of knowledge through some form of networking mechanism.

The VETEREST programme overall comprised nine components. The UVET component, in which the author had a consultancy role, was simply one of them. Interestingly, another component, Teachers Career Path (TCP) also contained an element not unrelated to ‘innovative learning and teaching strategies’. This is referred to in the report as ‘development of teacher qualifications enabling the use of contemporary teaching methods’ (table, p6 of report). The relationship between these separate components will be analysed later.

Referring to the overall programme, whilst the report claims: “ *Such PHARE initiatives have been indispensable in enabling Bulgarian experts and educators to keep in touch with international developments*” (p5). It nevertheless states: “ *...policy making and mainstreaming of pilot results has so far been less successful...*”(p5). This so-called mainstreaming, effectively the means by which good practice is cascaded from the pilot schools to other schools within the VET system, is one of the focuses of the research. Curriculum development under UVET is held up as one of the successes of the project although work was only completed on eighteen of the twenty to twenty-five planned vocations. Nevertheless, new modular curricula was developed for each of the eighteen vocations and are now operating in forty-one schools, six being non-project schools – this represents 10% of all vocational schools in the country (p14). This does suggest some cascading of the ‘new’ learning and teaching approaches albeit, rather limited.

Whilst it is possible to infer some references to the ‘outcomes’ of the UVET staff development seminars, most of the staff development evaluation here concentrates on the TCP component. The only overt reference to UVET staff development is in

relation to the curriculum development within the individual professions. The report does however refer to the study visits undertaken by specialists and experts from the Bulgarian VET system as part of the project. The author was involved in two such visits, hosted by his Institute, in which modular curriculum development was the focus. The report states: *"The contact with EU colleagues and the experiences gained during the study visits have positively influenced the course of the programme at pilot school level and above all for individuals: "a new way of conceiving our professions"* (p8). In terms of outputs, the report does make reference to: *"The implementation of student-centred teaching methodologies...."* (p14) but only in passing, commenting *"...particularly important for both teachers and students"*(p14). As pointed out above, most of the direct references to staff development are in relation to the TCP component.

Whilst the TCP component was never really envisaged as strictly within the scope of this research, it has become increasingly clear from this report that the sustainability, or otherwise, of the learning and teaching strategies introduced during the seminars the author was involved in, might also relate to the TCP. There is some suggestion that teachers might have been involved in both components. It will be one of the threads to investigate during the fieldwork: the exact nature of the TCP and who exactly was involved (facilitators and delegates). It certainly appears that there was 'overlap' in the nature of the content of both components. During the life of the project, the author had little knowledge of the TCP project. Given the apparent overlap, as a consultant on the UVET project, it would have made sense to have been made aware of activities on the TCP. The report concludes more or less the same thing:

"...a major issue is the connection between the UVET and TCP projects. There is no evidence that the initial training in module evaluation (assessment, internal / external verification) has either been completed nor effectively institutionalised in qualifications that accredits teacher's competencies." (p30).

This would seem to back up the author's view. As a consultant on the project, he reported that the main content of the seminars needed to be embedded into the Bulgarian initial teacher training system.

TCP centres were established in three schools to act as 'teacher training centres' to train teachers in the new modular approach. It was decided to do this rather than use the existing teacher training organisations because they were seen as: "*conservative and slow to undergo change*" by staff within the system (p14). Whilst the report suggests that the centres excited teachers interests, the report states that: "*...Centres failed to achieve sustainability...*" (p7). Where there were successes during the life of the project, these were largely down to the personal initiative at the schools. It is reported that there has been little activity since, with the exception of the Sofia centre, where the report states that it has: "*...established an excellent basis for sustainable development.*" (p15). Notwithstanding this comment, the report states that there is: "*...a limited dissemination process based on two persons from each school.*" (p15). The author is unclear as to the exact meaning of this statement but he intends to try and explore this during the fieldwork.

Some interesting comments by students, quoted in the report, provide an indication that student-centred methodologies were being used by teachers:

" I like the way of teaching because the teachers pay attention to every student." (p26)

" We are not bored with the classes because we learn a lot of interesting and useful material." (p26)

In terms of the overall human resource development aspect of the UVET project, the report is positive:

" As a result of the UVET project and training programmes a lot of people are now equipped with the skills necessary to enable them to contribute effectively to the successful completion and continuation of the project objectives. The staff acquired experience and skills to continue the long-term development of VET. Each pilot school has appointed a member of staff to the role of teacher trainer and internal verifier." (p26).

It will be interesting to find out exactly how many of these staff are still in post or within the system and if / how new post-holders are being trained in the new approaches. Regarding overall dissemination of project information, particularly related to the application of educational processes, the report claims that the exercise

was: "...largely futile." (p30) given that it was restricted to pilot schools only. The report goes on to state that for the VETEREST programme overall it was impossible to give a general judgement on dissemination activities given the several sub-programmes and their diverging results, successes and difficulties. They do however conclude, that in general dissemination activities have not yet led to a permanent mechanism for the circulation and exchange of information (p30).

Dissemination is clearly linked to sustainability. The VETEREST programme as a whole was designed along pilot lines on the assumption that implementation and cascading would spread throughout the system:

"...beyond the 30-odd pilot schools and through a system of dissemination, the new curricula, modules, teacher training methods and methodological know-how, a mainstreaming of the whole programme throughout the Bulgarian education, training and S&T (science and technology) systems could be set in motion." (p30).

This has not taken place because proper provision was not made for it in the design of the programme. In fact in the consultants original terms of reference, there was an indication that 'counterparts' were to be trained, ie. teaching staff identified as being capable of disseminating the approaches effectively within the system. This simply did not take place. There was one exception to this early on in the project, when counterparts were identified. In all other cases no counterparts were available. As far as this research is concerned, one of the key findings in the report states:

"...the teacher training achievements, and the centres established (TCP and FLT – foreign language training), have not been integrated into the national teacher training systems or translated into national practice."(p31).

Whilst in terms of overall reform of the system this might be true, as far as the pilot schools themselves are concerned, the report recognises that they have changed. The report recognises that the investment has initiated a 'new era' in the institutions involved and impacted greatly on administrative staff, teachers and students alike:

"According to their own view, teaching and learning has changed its paradigm, and opened people's eyes to consider alternative methods. This is a process that cannot be reversed." (p32)

2. The British Council (Development and Training Services)

Bulgaria – Upgrading Vocational and Technical Education and Training

Case Study – June 2000

The findings in this case study more or less reflects what the AMU Gruppen evaluation found. There are some notable exceptions however, which will be considered later. At the time the authors of the case study carried out their research, five months after the project came to a close, they concluded that Ministry (MES) officials were aware of the need: “...for the introduction of practical elements in schoolwork and for a change in teaching styles.” (p50). This more or less acknowledges that widespread reform in this area had not been achieved. Whilst the case study reports that the UVET project introduced pilot school teachers to student-centred learning and a range of other things including, methods of linking theory to practice and new approaches to assessment, it is also recognised that beyond the pilot schools:

“...teaching remained based on a teacher-centred methodology focused on imparting knowledge with very little attention being given to problem solving, group discussions and the promotion of research and independent work.” (p50).

The authors of the case study expected Sofia University’s Institute of Teacher Training to have had some kind of role in initiating change, or at least be involved in developments, but it is not clear if mechanisms were in place to do this. AMU Gruppen’s evaluation claims there was no mechanism left in place. Interestingly, the case study reveals that teachers within the system do not regard the Institute very highly:

“ The Institute’s courses are perceived as having a tendency towards being teacher-centred and theoretical. In some ways they mirror the poorer practice of those vocational and technical schools, which have not benefited from being involved in the UVET pilot. The in-service courses which the Institute has developed in collaboration with the MES have not been favourably received by teachers and education managers.” (p52).

More damningly, the report goes on to state:

“These shortcomings have resulted in Sofia University no longer being considered by teachers and school directors to be a source of worthwhile training in technical updating for teachers within the VET system.” (p53).

This is worrying given that they are considered the key providers of such training. One of the key areas in which there appears to be some discrepancy between the case study findings and the AMU Gruppen evaluation report findings, relates to the TCP centres. Whereas the evaluation report concluded that they failed to achieve any measure of sustainability, the case study states:

“...the TCP centres are in general continuing to function well. These centres are all located in schools and offer technology-based training to teachers in student-centred learning and assessment methods. They are generally well regarded by school directors and teachers...” (p54).

Despite these findings, a trend appears to be developing of schools using private training providers, and in some cases even raising funds to send teachers overseas for training, although these are usually for IT or technology based training rather than teacher training (p56).

3. Final Report - Phare Project BG95. 06-01.01

Upgrading Vocational Education and Training Project

Prepared by The British Council

The actual report is relatively short with the bulk of the document consisting of appendices. Although it does not contain a publication date, the author estimates it to be early 2000.

As one might expect, being drawn up by the lead organisation of the project management consortium, the report paints a positive picture of the project overall. The executive summary lists a number of achievements under the headings: policy development; curriculum development; human resource development; and, sustainability. Certainly no one can deny the many tangible achievements that are listed here. However, it is with the latter two areas listed – ‘human resource development’ and ‘sustainability’ that we must look for less tangible achievements,

both of which have a key bearing on this research. For example, the research seeks to verify statements such as the following:

“Human resource development was planned and delivered through a variety of means throughout the project to prepare for, or build on, the EU consultancy inputs. It was also designed to ensure that the project would impact upon the whole VET system in Bulgaria by leaving sustainable skills in-country. Training was provided at all levels in the system.... Teachers were trained in new curriculum development, assessment and teaching methodologies...there is now a longer term development plan to cascade training throughout the system.” (executive summary p3 unnumbered section)

Note: The initial pages of the report are not numbered but in referencing extracts from these sections, numbers have been allocated.

If this is the case, it will be a hugely important determining factor in the long-term sustainability of the project. However, as the author has already pointed out, no significant counterpart training took place to effectively facilitate this. In the recommendations under the human resources development section, the report states that initial and in-service teacher training programmes need to be reviewed:

“...to provide in-service staff development programmes that provide the impetus and motivation for continued change and development.” (executive summary p6 unnumbered section)

The report rightly identifies that:

“ The sustainability of the skills and experiences gained through the UVET project will be the real measure of its success.” (executive summary p4 unnumbered section)

Under the ‘sustainability’ section of the list of achievements, the report states that ‘at a school level’;

“ Teacher networks and working groups are established which will provide ongoing expertise and experience in the curriculum development process. Teachers are able to identify and solve problems and train other teachers in the student-centred methodologies.” (executive summary p5 unnumbered section)

The report indicates that a number of sub-groups involving VET ministry personnel were set up under the main MES working groups, with responsibility for developing

specific components of the project. Interestingly, staff development was not identified as one of these. Would this have any negative effect on the success of this component of the project? According to the report, the answer is a resounding no:

“ Reports indicate that teachers are changing their approach to one that involves considerable student-centred work.” (par. 157 p30)

The reports referred to here are attributed to ‘a combination of EU and local consultancy.’ Reference is made to a local consultant being appointed in February 1998 to evaluate project progress (p31) but it is unclear whether this was part of the overall AMU Gruppen evaluation or something separate. The report states that as part of the evaluation of project progress process, to complete it fully:

“...an assessment was also made of the teacher training methodologies being used in the classroom...” (par. 158, p31)

This statement is not entirely clear. The author believes it means ‘the teaching methodology’ being used in the classroom rather than ‘teacher training methodology’. The evaluation process confirmed that the curriculum was being implemented as planned and that:

“...teachers were using student-centred learning techniques were (sic) applicable (par.162, p31)

This is all good news since this was the aim of the seminars he was involved in. However, regarding this research, the author needs to observe this himself. One problem that is referred to is in trying to adopt a performance / competency assessment approach when the schools were still using grading systems. Even further staff development inputs focussing on assessment, which the author was also involved in, were destined to have limited impact in this respect, given the sacrosanct use of the ‘six-point’ grading system.

Although the report points to the success of student-centred learning, the following recommendations in the report indicate that its use may be limited to the project / pilot schools:

“ These essential techniques in assessment, curriculum planning and student-centred teaching need to be disseminated formally to teachers in other schools and to newly qualified teachers in project schools. Teachers trained under the project should be used to deliver this training.” (par. 168 p32)

Whilst the author is not entirely convinced about the ‘global’ comments made in the report regarding the successes, he most certainly agrees with the following point:

“ Teachers responded with enormous energy and commitment throughout the project and have shown confidence in the use of the teaching methodologies and tools.” (par. 208 p39)

This was certainly the case during the life of the project, whether it has been the case since the end of the project, in 1999, remains to be seen.

In Table 2 in the report, a list is given of the human resource development outputs achieved. Under the project aim: ‘ to change teaching attitudes and introduce student-centred teaching methods throughout the curriculum’, the output is stated as:

*“ A cohort of 130 teachers familiarised with student-centred teaching methods...”
(Table 2)*

There are a number of things to pursue here. It is interesting that the term ‘student-centred *teaching*’ is used frequently in the report, rather than the more accurate and descriptive ‘student-centred *learning*’. Since the whole focus of the concept is on learning rather than teaching, one wonders, given the fact that local consultants were involved in some of the evaluations, whether the actual interpretation and / or perception of the concept itself may have had some impact on the way things have been reported.

Summary

In the earlier sections of this literature review, the author has sought to inform his work by considering current and historical writings in key areas relating to the research. Whilst the review covers a broad range of relevant texts, which the author believes has provided him with an invaluable background and platform to progress his

work, many more texts than are contained in the review have had to be accessed throughout the work, in order to provide specific background or contextual references. All works referred to can be found in the bibliography.

It is clear from the evaluation documentation that there are a number of issues to follow up. If the comments in the case study, about using private training providers, does in any way reflect a real trend rather than isolated examples, then it does suggest that the original aim of disseminating good practice throughout the system, has been short lived. Whilst all the above documents do identify examples of good practice and indicate very clearly the impact that the project has had, it is apparent that any meaningful sustainability is very fragile. The final report perhaps provides the most positive overview.

One thing that repeatedly keeps being referred to in the reports is the 'teacher's enthusiasm'. This reflects very much the author's findings immediately after his last round of seminars in 1999. The pilot survey questionnaire responses, implemented for this research at that time, confirms this (see Chapter Five). In fact, perversely perhaps, this was one of the reasons why the author decided to embark on this research – to see whether such enthusiasm could be translated into effective implementation in the schools. The next chapter looks at the research methodology and considers the benefits and limitations of the data collection methods adopted. In addition, with reference to relevant literature, the author also considers some of the philosophical and contextual issues relative to the research. This will include the nature of knowledge and the relationship between knowledge and how one perceives it. The concept of culture and the role of the translator will also be explored.

CHAPTER 5

RESEARCH METHODOLOGY

In the introductory chapter, and elsewhere in this thesis, the author has identified and elaborated on the focus of this work and the rationale behind it. However, the author believes it will be useful to express again, in very simple terms, the exact nature of this research. This should enable the reader to link the proposed methodology with the stated aims of the research.

As a result of introducing 'new' and 'innovative' teaching and learning strategies to staff within the Bulgarian VET system, during a series of intensive staff development seminars, the author wishes to assess whether:

- staff have actually adopted the 'new' approaches in their own teaching
- a student-centred culture has developed within the Bulgarian VET system
- there has been any 'cascading' of 'new' teaching methodology to the non-pilot schools

In relation to all of the above...a further, more important question:

- if not...why not ...and were / are there, any cultural and / or contextual factors that have impacted on the implementation of such approaches?

Clearly, the only realistic way of assessing the above is to actually visit the schools and see what is going on there. The key question however, is exactly what to do once there? What is the most effective way of gathering the 'evidence', given that the time available to carry out the fieldwork is limited? Before this however, the protocols and ethical considerations needed to be considered.

Ethics and protocol

One of the most important guiding principles when undertaking any kind of research is that it should be carried out with due regard to ethical considerations. In its simplest interpretation, this means carrying out research in a 'proper and professional manner' whilst at the same time ensuring no one is harmed in the process. The ethical issues faced by educational researchers are usually not dramatic in their consequences. However, the controversy surrounding several high profile research experiments in the area of psychology (Sturt, 2003; O'Toole, 1997)²⁰ - the source of much educational theory, has led to much tighter guidelines and codes of practice being produced for all areas of research. The need for regulation and codes of behaviour however may be traced back to the aftermath of the Nazi atrocities carried out in the name of research during the Second World War (Anderson with Arsenault, 1998). Whilst this may seem far removed from educational research, subsequent investigations did focus on the importance of codes of informed consent. The American Sociological Association (ASA) adopted a formal code of ethics in 1969, followed four years later by the American Psychological Association's (APA) own code of ethics for research with human subjects, no doubt prompted by Milgram and Zimbardo's activities (see footnote). The British Sociological Association's (BSA) guidance on ethical practice, along with most universities' own research codes of practice can be traced back to the ASA and the APA's work.

When carrying out research into comparative education, the ethical principles must be the same when dealing with human subjects. For example when interviewing or observing, it should be made clear to those involved, the purpose of such research and how the outcomes will be used and published. It is also normal to ensure anonymity with regards to their responses. This is to ensure that if they were critical of some aspect of their organisation, for example, they would not be penalised. A potential ethical dilemma for the researcher, is if he or she becomes party to some information

²⁰ Stanley Milgram's experiments in which unsuspecting volunteers were asked to give 'electric shocks' to other 'volunteers' and Philip Zimbardo's infamous 'Stanford Prison Experiment' in which one group of students took on the role of prison warders and ended up actually abusing other students acting as prisoners, both carried out in the name of research, in the early 1970s continue to create argument and debate about the ethics involved to this day.

of a sensitive or serious nature, the implications of which might have far-reaching consequences - should this be made public? Clearly judgements need to be made in respect of the specific circumstances, and if necessary advice sought. For a more detailed and enlightening discussion on the ethics and politics involved in carrying out research see Punch in Denzin and Lincoln (1994 pp 83 – 97).

With regards to this research, the author followed all reasonable ethical guidelines in carrying out the research, (Bell 1999; Cohen and Manion 1994). All interviewees were given an overview of the precise nature of the research, and questionnaires contained an explanation of the purpose of the research. A tick-box on the cover, referring to a question asking respondents permission to quote comments anonymously, was also included. The principle of acting with integrity and professionalism, by ensuring anonymity and ensuring transparency of the research, was uppermost in the author's mind at all times.

One, if not the most important part of this whole process, was to be secure access to the actual 'research field', in this case the schools, and get permission to interview and observe members of the school population (directors, teachers, and students).

This is not always the easiest thing to do and must be done at an early stage (Bell, 1999; Vulliamy et al, 1990). The actual details of how the author ultimately gained permission to visit the schools is described in detail in Chapter Six. In the event it proved rather more difficult than anticipated. Various letters and e-mails were sent to the Bulgarian Ministry of Education, the British Council, Sofia and the Human Resources Development Centre (HRDC), Sofia, seeking help in this direction. Descriptions of the researcher and the research were also sent. It was not until the author actually managed to meet the Director of VET at the Ministry in Sofia, and receive a 'letter of introduction...' to hand to school directors requesting their co-operation that he felt secure.

The author identified some time ago that a survey of teachers' views / opinions would form a key source of evidence. Prior to his last working visit on the project, in May 1999, he devised a questionnaire to distribute to delegates at his last series of

seminars. This had the dual intention of gathering some initial data, and also to act as a preliminary 'pilot' questionnaire, prior to carrying out a further survey. A commentary, together with an analysis of the results of this survey is given later in this chapter. The author identified a period of two years from the end of the project, as being an appropriate period of elapsed time, before carrying out a further survey, as part of a fieldwork visit. This was to ensure sufficient 'bedding-in' time.

It has already been made clear that the teachers must be seen operating 'in the field' before any judgements can be made about the questions posed. This will inevitably mean detailed planning before any fieldwork trips can take place in order to make best use of the available time. As pointed out above, the most pressing question was what methods of evidence gathering or data collection are likely to yield the most useful results?

Approaches to data collection

Methods of gathering research evidence broadly fall into two main categories: 'quantitative', which is mainly concerned with the gathering of objective and verifiable statistical evidence, and 'qualitative' which is based more on perceptual and interpretative approaches to observed phenomena. The former is often referred to as 'hard' research, the latter 'soft' research (Denzin & Lincoln (Eds.), 1998; Gillam, 2000; Vulliamy, Lewin & Stephens, 1990). Whilst debate continues about the relative merits of both main approaches, the scientific community, which uses mainly quantitative methods, does now accept that qualitative approaches have important applications in certain research areas, particularly in the social sciences. It must be stated that neither qualitative nor quantitative approaches are mutually exclusive. Qualitative researchers may need to use quantitative approaches as part of their research and vice versa. Both approaches include many specific methods of gathering data but it is qualitative research that is defined by its 'multiple methodologies' (Denzin & Lincoln, 1994). In fact several different methods do need to be used, in the interests of crosschecking findings. This is particularly the case where qualitative methods are used. As Gillam points out:

"No one kind of source of evidence is likely to be sufficient (or sufficiently valid) on its own." (Gillam, 2000 p2)

This whole question of validity is a crucial issue where qualitative research is concerned. Whereas the scientific community will use quantitative approaches in order to reproduce exact conditions, for example, in a laboratory, to not only replicate results but also to predict them as well, and therefore validate their findings, social phenomena cannot be reproduced as easily, if at all:

"...validation cannot occur through subsequent replication, since identical social circumstances cannot be re-created outside the lab. Social life contains elements which are generalizable across settings (thus providing for the possibility of the social sciences) and other elements that are particular to given settings thus forever limiting the predictive power of the social sciences." (Bloor in Miller & Dingwall, eds., 1997 p37)

Because of the transient nature of social phenomena and the difficulties of gathering hard factual data, some form of cross-checking of available data / phenomena is necessary in order to support and verify it. Such 'triangulation' (Cohen & Manion, 1994; Denzin & Lincoln, 1994, 1998; Lewin in Vulliamy et al 1990) looks at the same or related problems / issues from different perspectives using different methods. The term triangulation originated in the fields of surveying and navigation. It is used to pinpoint exact position by plotting relative position in relation to known points, for example land based features or the stars. In research, the term simply means using two or more approaches to look for some kind of convergence of results. For example questionnaire findings could be cross-checked by using a series of interviews. but as Denzin and Lincoln warn:

"Triangulation is not a tool or a strategy of validation, but an alternative to validation." (Denzin & Lincoln, 1988 p4)

Within the context of this particular research, the author considers that anything other than a brief overview of the various philosophical paradigms that underpin general sociological research would be inappropriate. For a detailed and authoritative account of the history and development of the various schools of thought, and movements that have developed over the years see Denzin & Lincoln's *Handbook of Qualitative*

Research (1994). However, an account of the author's theoretical framework in relation to his research and a discussion related to the various philosophical paradigms is given below.

The main theoretical framework of this research is built around the issues involved in the application of educational 'innovation' across cultures. These issues will be looked at later in this chapter. Whilst the author is of the view that not all things can be 'measured' quantitatively, he does acknowledge the application of such approaches. However, it will be useful to identify here that the approach adopted in this research is largely 'interpretive'. The researcher is of the opinion that there can be no single and objective assessment, based on some kind of standardised benchmark, that can be used with reference to describing and making judgements where there is a cultural dimension to the research. Cultures are shaped by their context and each is unique. There are some problems with this view however, since some judgements about student-centred learning, for example, need to be made with reference to 'accepted' approaches that characterise it. In this sense some objectivity is required. In a sense, the fact that a combination of both quantitative and qualitative approaches are to be used, should give the widest possible picture.

With reference to the 'paradigm debate', a series of questions have been identified that more or less characterise the various approaches. These can be classified as:

- ontological - what is the nature of knowledge / of reality?
- epistemological - what is the nature of the relationship between the knower / enquirer and the known?
- methodological - how should the enquirer go about finding knowledge?

(Denzin & Lincoln, eds.1994; Guba, ed. 1990)

The above classification requires further elaboration however. Ontology, essentially a branch of metaphysics, is concerned with the relationship between humankind and the nature of 'the real world'. Ontological debate revolves around whether there is an actual and objective real world existing independent of humankind or is the world a

subjective construct, perceived by individuals interacting with it. As far as research is concerned, the former view is held by the 'hard' positivist lobby, which insist that no individual interpretation of events is possible. The latter view, on the other hand, which stresses that no independent and objective assessment of events is possible – they must be individually interpreted, is expressed by the 'soft' or post-positivist lobby. A further explanation of the distinction between positivist and post-positivist approaches is given later in this chapter.

In rather the same way, an individual's view of the actual nature of knowledge (epistemology) can also impact on the researcher's approach. The realist or positivist view suggests that knowledge itself is a real and tangible entity that can be transmitted in a clear and logical manner, whereas the opposite view sees knowledge acquisition as something much more complex. It must be individually experienced and interpreted. In fact a further definition of this latter view is 'interpretive', the realist view also being known as normative.

The third classification of questions identified under the title of 'methodological', given above is a little more straightforward to interpret. Put simply, the researcher's stance relating to his or her views related to the first two classifications, will guide their methodological approach. As we have already seen, broadly speaking, there are two distinct approaches: quantitative and qualitative. The former is likely to be utilised by the realist / positivist / normative researcher, whilst the latter is more likely to feature strongly by the post-positivist/interpretive researcher. In practice however a combination of approaches might well be adopted. A discussion of the approaches used in this research is given later in this chapter.

Burrell & Morgan cited in Cohen & Manion (1994), identify the 'methodological' question as a development from assumptions based on ontological, epistemological and human nature itself. These are the frameworks or paradigms that are used to interpret research. The term 'paradigm' itself has been defined as:

"...a basic set of beliefs that guides action, whether of the everyday garden variety or action taken in connection with a disciplined inquiry." (Guba, 1990 p17)

In other words the term is used to describe the researcher's interpretative framework. Paradigm is a much more all-encompassing description than 'example' or 'model', which essentially relate to the same thing. The philosopher Thomas Kuhn is associated most closely with the term. In 'The Structure of Scientific Revolutions' (1962), Kuhn explains his use of the term within the context of 'models' and 'examples':

"By choosing it (paradigm), I mean to suggest that some accepted examples of actual scientific practice – examples which include law, theory, application, and instrumentation together – provide models from which spring particular coherent traditions of scientific research." (Kuhn, 1962 p10)

Kuhn also likened scientific revolutions to political revolutions. Just as scientific models or theories (paradigms) have to be replaced in the light of new research findings, so political systems need to adapt to new social situations. As to who considers paradigm shift revolutionary or not, it depends on one's perspective and who is affected. In what this author perceives to be a 'future echo' of the situation in Bulgaria, Kuhn illustrated it thus:

"Scientific revolutions...need seem revolutionary only to those whose paradigms are affected by them. To outsiders they may, like the Balkan revolutions of the early twentieth century, seem normal parts of the developmental process." (Kuhn, 1962 p92)

The concept and use of the term paradigm is equally relevant to educational research (Verma & Mallick, 1999). Paradigms pre-structure what is seen and understood in science. The two main research paradigms are 'positivism' based on clear and objective truth and 'post-positivism' which is a subjective approach based on 'multiple truths'. In fact post-positivism is an umbrella term that covers a huge variety of separate views but all rejecting the absolute scientific approach of positivism. As the terms suggest 'positivism' tends towards quantitative approaches whilst 'post-positivism' tends towards qualitative approaches. Although it is claimed that all researchers tend to align themselves with one or the other approach (Ibid), it is also now widely accepted that a combination of approaches may be more fruitful. Indeed, this research, whilst mainly relying on qualitative approaches, will also attempt to

collect some data using quantitative methods. More details explaining the reasons for using the various methods are given later in this chapter.

It has already been established that quantitative research lies predominantly in the domain of the so-called 'positive' or 'hard' sciences, including such fields as chemistry, physics, economics and psychology. These were often seen as the 'crowning achievement' of Western civilization or 'vertex of human achievement' (Nickolau & Manonelles, 2000) and that in their practices it is assumed that truth can transcend opinion and personal bias (Carey, 1989 in Denzin & Lincoln, 1994). Whilst education is considered a 'soft' science, early research related to education was very much rooted in psychology. For example the work of people like Thorndike and Skinner, who experimented with animals in the development of the 'behaviourist' approach to learning, based on stimulus and response.

Adherents of positivist research in the sciences assumed that reality could be studied, captured and understood - theories could be established and verified then rigorously validated. It was the Austrian philosopher Karl Popper however, who challenged this view, by asserting that scientific theories cannot be verified, only tentatively refuted in the quest for meaning. Popper's dedication in *'The Poverty of Historicism'* graphically underlines his views:

"In memory of the countless men and women of all creeds or nations or races who fell victims to the fascist and communist belief in Inexorable Laws of Historical Identity."
(Popper, 1961, dedication page)

He summed up his arguments in five statements but he described as the 'decisive step' the following:

"We cannot predict, by rational or scientific methods, the future growth of our scientific knowledge." (Popper, 1961 pv)

However, in terms of criticism of the positivist approach to research in the social sciences, the following statement is much more pointed:

"This means that we must reject the possibility of a 'theoretical history'; that is to say, of a historical social science that would correspond to 'theoretical physics'. There can be no scientific theory of historical development serving as a basis for historical prediction." (Ibid, pvi)

Billingham (1993) summed his approach up well:

" According to Popper, the whole of scientific enquiry has been a process of providing a hypothesis and attempting to disprove it". (Billingham, 1993 p288)

" Popper's main concern was to expose what he termed 'pseudosciences' which are unverifiable, such as the Marxist claim to have scientific interpretation of history, or the acceptance of psychoanalysis as a science". (Ibid, p8)

It was the emergence of the 'Chicago school' of post-positivists and people like Becker, Geer, and Strauss that fully established the view that reality can never be fully apprehended, only approximated. Instead of verifying theory, there was more of a move to 'discover' theory. Quantitative research made great strides however after the Second World War. The rapid development in technology greatly assisted this, with more effective ways of coding and clarifying data. This was of limited use where the study of people and societies in general were concerned however. This is where the 'verification' or 'generation' of theory debate is best illustrated:

"...there is no fundamental clash between the purposes and capacities of quantitative and qualitative...methods or data. What clash there is concerns the primacy of emphasis on verification or generation of theory." (Glaser & Strauss, 1968 p17)

Glaser and Strauss chose the term 'grounded theory' to illustrate the idea that theory is generated or 'grounded' by processes of continual sampling and analysis of qualitative data gathered from concrete settings, for example in a particular institution, using interviews, observations and studying archives (Pidgeon in Richardson, 2000). As Glaser and Strauss contend:

" Qualitative research is often the most 'adequate' and 'efficient' way to obtain the type of information required and to contend with the difficulties of an empirical situation (Glaser & Strauss, 1968 p18).

Methods to be employed

In carrying out this research then, a number of strategies will be used to gain a sufficient enough overview of the situation in order to provide an informed judgement on what impact the project has had in the area of teaching methodology and factors that may inhibit change. Whilst some quantitative approaches will be used in analysing the questionnaire responses, as already pointed out, much of the work will be qualitative in nature. This combination will be particularly appropriate at this relatively recent stage of implementation since the end of the project. As Vulliamy et al point out:

“...qualitative research techniques are especially suited to the early stages of the implementation of an innovation whilst more quantitative measures of outcomes may be required to assess the impact of an innovation, once it has been effectively implemented.” (Vulliamy et al, 1990 p17)

Although the main approach will be qualitative in nature, the author does feel that some quantitative data will be useful to support his work. For example data related to length of commercial / industrial experience and teaching experience, across a wider sample than those interviewed will provide useful statistical data to support, or otherwise, inferences that may be made. Whilst in-depth statistical analysis will not be a priority here, some numerical data will be useful:

“In qualitative research, numbers tend to get ignored. After all, the hallmark of qualitative research is that it goes beyond how much there is of something to tell us about its essential qualities.” (Miles & Huberman, 1984 p215)

The particular strategies chosen therefore, are:

- a. documentary analysis – (to analyse / compare independent findings)
- b. questionnaire survey – (to provide quantitative data over a wider sample for comparison and ‘validation’ purposes and to elicit ‘anonymous’ quantitative comments)
- c. semi-structured interviews – (to provide in-depth qualitative data for comparison with b above)

- d. non-participant observation – (to 'validate' data gathered in a, b and c)

TMS

A case-study approach will be used for contextual purposes. As pointed out above, whilst it is anticipated that some quantitative data will be gathered, most of the data collected will be qualitative which hopefully should yield some rich and relevant information. As Bogdan and Bicklen point out when describing qualitative research:

" We use qualitative research as an umbrella term to refer to several research strategies that share certain characteristics. The data collected have been termed soft, that is, rich in description of people, places and conversations, and not easily handled by statistical procedures." (Bogdan & Bicklen, 1992 p2)

Almost by definition, the methods adopted above will rely to a great extent on research 'in the field'. In other words, by visiting schools involved in the project to observe things in their natural setting. Any research that has a cultural dimension to it can be fraught with problems for the researcher. The next section in this chapter will consider the methods of data collection identified above and also discuss the implications of carrying out research into or between cultures, with reference to the literature, and within the context of this particular research.

Preliminary data collection

As previously indicated, preliminary data collection was commenced in May 1999, whilst the author was still engaged as a consultant on the project. It was decided to restrict the data collection to a questionnaire survey of teachers involved in the seminars. There were three reasons for this, firstly, it was decided that the use of a questionnaire at this stage could usefully act as a 'pilot' for a later, possibly more refined version, secondly, the data at this stage of the project could yield interesting comparisons with data collected some time after the completion of the project, and thirdly, the author was concerned at the time that his dual role as consultant and researcher might compromise both roles by using more 'invasive' techniques.

An account of the preliminary pilot study, together with a summary of the results is given later in this chapter.

The case-study approach

The use of case studies is the pre-eminent method of researching societies, organisations and cultures. Of these, the last two are central to this research. But a case can be an individual as well as a group. It can be a family, a class, an office, or a hospital ward (Gillam 2000). It is an intensive study of 'one instance' whether that one instance be a person, institution or place (Vulliamy et al 1990). Case studies are not actual strategies in themselves; rather, they encompass a range of data collection methods, usually qualitative in nature. Using multiple strategies like this, each with its own strengths and weaknesses is a particular characteristic of the case study approach (Gillam 2000). In this research, three schools were originally chosen to look at, but as opportunities arose in the field, seven were actually looked at. In effect, this can be considered as seven 'cases'. Whilst this is a relatively small percentage of the total number of pilot schools involved in the project, it can still be considered valid since case studies are more about depth rather than breadth. In fact, even looking at six schools (one was a non-pilot school) it still represents 17% or just under a fifth of the original total pilot programme, so it is not insignificant.

" Since accurate evidence is not so crucial for generating theory, the kind of evidence, as well as the number of cases is also not so crucial. A single case can indicate a general conceptual category or property; a few more cases can confirm the indication." (Glaser & Strauss, 1968 p 30)

Some case studies concentrate on only one case, but since case studies are largely concerned with depth rather than breadth, this is valid. However, it can be argued that unless cases are carefully selected, they may not be representative and any generalizations may not be valid (Verma & Mallick, 1999). On a large scale, single nation studies became increasingly common in the mid-1960s, particularly studies of countries and societies in transition (Rose in Rokkan, 1968). The countries currently in transition in CEE, including Bulgaria, are continuing to provide material for such studies. This case study is essentially a process of 'cluster sampling' where, due to the travel and time constraints, a wider sample would prove unrealistic. Since the institutions identified are a combination of pilot and non-pilot schools, the findings should prove relevant and illuminating.

One of the key strategies employed in case study work is interviewing. But if interviews alone were used, there would be no way of confirming if, for example, 'they do what they say they do'. This is one of the strengths of the case study, such things can be checked in practice (Glaser & Strauss, 1968; Gillam 2000). In this case a combination of observation, interviews and questionnaire surveys are to be employed. In addition, data has also been collected by desk study of relevant project documentation and by administering a questionnaire. As Gillam points out:

" Different methods have different strengths and different weaknesses. If they converge (agree) then we can be reasonably confident that we are getting a true picture. If they don't agree then we have to be cautious about basing our understanding on any one set of data." (Gillam, 2000 p13)

Documentary analysis

Whilst this can be time consuming, it should prove to be relatively straightforward in this case. Whilst there are some useful project policy documents available, the key documents to be considered are few in number. Of the documents available, the following will be central to the desk study: 'Evaluation of Phare VET Programme BG 95.06'; 'Bulgaria – Upgrading Vocational Education and Training – Case Study'; and, 'Phare Project BG 95.06-06. Final Report'. The 'evaluation' was carried out by AMU Gruppen, a Swedish consultancy organisation commissioned by the ETF and published in the first quarter of 2000, barely four months after the completion of the project. The 'case study' evaluation was carried out by people involved in the management of the project under the auspices of The British Council, the main project management organisation. Again, this case study was carried out early in 2000, soon after completion of the project. The final report was, again, completed by the British Council. These documents are reviewed in Chapter Four. Additional publications by the ETF on key indicators in VET in CEE and cross-country reports will also be referred to at appropriate points.

Questionnaire surveys

Questionnaire surveys are one of the most widely used methods of gathering research data. Hardly a week goes by without a questionnaire falling through the letterbox from some consumer organisation researching lifestyle trends in relation to product consumption. In terms of response, it would be extremely small for such questionnaires were it not for the added incentive of possibly winning a Caribbean cruise! From an educational research point of view they remain popular and are useful where the sample is geographically widely spread, since they can be administered by post. At the very least, they should include stamped addressed envelopes to encourage respondents to return the questionnaire. Such 'self-completion' questionnaires, in which the respondent answers the questions themselves can yield important information only if the questions are meticulously thought out. During the preliminary stages of this research, the author developed a pilot questionnaire, which contained a number of flaws, these are discussed later in this chapter. One of the biggest problems for the author was in the interpretation and coding of open response items. As Cohen and Manion (1994) advise:

“ Avoid open-ended questions on self-completion Questionnaires. Because self-completion questionnaires cannot probe respondents to find out just what they mean by a particular response... ” (Cohen and Manion, 1994 p94)

An added problem for the author was the fact that the questionnaire needed to be translated into Bulgarian, which required the construction of the questions to be even more important:

“ Question wording (or the wording of any passage) and translation go hand in hand, since it is difficult for a bilingual to translate poorly written passages into another language. Cross-cultural investigations should be concerned with the communication of many aspects of their research, including the introduction of the research to potential subjects, instructions, questionnaires and subject responses. All demand clear wording in one language and subsequent translation to another.” (Brislin et al, 1975 p32)

As the following chapter illustrates, the author was not entirely successful in this respect but the pilot study did highlight the limitations of questionnaire surveys and

point to more effective ways of gathering data. A decision was made therefore, to gather some data using a questionnaire survey but restrict the questions to a closed format and use other means of data collection to get more qualitative data. At the planning stage at least, it seemed that for this research, interviews were likely to provide more detailed and clearer information.

Interviews – semi-structured

This is perhaps the single quickest way in research of getting 'inside a person's head' (Tuckman in Cohen & Manion, 1998). Interviews can range between being structured, where all the questions are pre-set, to being unstructured or open-ended. For the purposes of this research a semi-structured approach was chosen. Although a strict set of pre-set questions might make for easier translation and subsequent transcription, it would close the door on potentially interesting avenues of enquiry that may arise. On the other hand a completely open-ended conversational style interview could make both translation and transcription far too demanding. Gillam (2000) claims that a semi-structured interview is the most important form of interviewing in case studies and that, well done, it can yield the richest single source of data. Bogdan & Bicklen (1992) say that with such interviews you are confident of getting comparable data across subjects. The weakness with any kind of interview is, either the subject will say to you what you want to hear, the 'courtesy bias', or will take you for a fool by providing mis-information, the 'sucker bias' (Mitchel in Rokkan, ed., 1968). These are not always easy to guard against which is why case studies use multiple methods of gathering / comparing data. In reference to carrying out case study work in developing countries, Lewin (1990) is in no doubt about the most effective interview method:

" I decided to use a semi-structured approach to interviews after considering structured and unstructured approaches as represented in standard texts. Pre-coded interview schedules designed to be followed rigidly were clearly not appropriate to the exploration of research questions designed to gain deep insights..." (Lewin in Vulliamy et al, 1990 p120)

Whilst a 'formal' interview schedule had been prepared, the author also hoped to carry out some more informal interviews in a social setting to add further depth and

background to the study. It was anticipated that the interview responses would consolidate, and vice versa, the observed activities.

Non-participant observation

It has already been stated that due to possible role conflict, the earlier preparatory research was restricted. That is to say, during delivery of the seminars, the role of the author was consultant, and this was the service that were being paid for, not to spend time interviewing delegates. This was a key concern related to the gathering of observational data whilst actually engaged in delivering the staff development seminars. Although participant observation is commonly used by ethnographers (Bogdan & Bicklen, 1992; Toren in Richardson, ed. 2000; Verma & Malick, 1999; Vulliamy et al, 1990), this research was in no sense a long-term ethnographic study in which the observer would have time to become a member of the community he or she was observing, therefore participant observation was out of the question. Furthermore, the timing of any observations coming so close to the seminars was deemed by the author to be inappropriate. A longer period of 'bedding -in' of the student-centred approaches was thought necessary, and also, the author considered that a more objective view could be gained when the tutor - delegate relationship became more distant.

A schedule of fifteen separate classroom / workshop observations was drawn up covering two pilot schools and one non-pilot school, to collect data on the teaching / training methods in use. Unobtrusiveness was to be paramount and the duration of observation being dependent upon factors such as students / teacher settling into 'normal' behaviour patterns, at least as far as could be judged under such circumstances. It was anticipated that no observation should last for more than one hour, during which time observation notes would be taken. Clarification was sought from teachers after observations, on occasion, and informal 'feedback' on perceptions of events given to the teachers where requested. Of course the author was sensitive to any apparent cultural or professional differences perceived - in essence, this forms the heart of the study overall.

The question of culture

The term culture has multiple meanings depending upon the context in which it is used. As far back as 1952, Kroeber & Kluchohn reviewed over one hundred and fifty definitions of the term (in Brislin et al 1973). The following definition is based on the UNESCO's 1998 Barcelona Declaration of Cultural Rights:

" Culture is the sum total of beliefs, myths, knowledge, institutions and practices whereby a society or group affirms its presence in the world and assures its reproduction and persistence through time. In other words, a style of life that takes in the whole existential reality of the persons and communities in a society, and not only arts, folklore and beliefs." (Nicolau & Manonelles, eds., 2000 p3)

We can add to this such things as shared values and norms. When describing peoples of different ethnic origin from our own it is usual to make use of the term culture. 'Youth culture' is a common descriptive term used in newspapers, but this appears to suggest that all 'youths' are bound by the same cultural traditions. In fact there are many 'youth cultures', often aligned to various musical styles, for example we have seen over the years 'mods', 'rockers' and 'punks', all with their own distinctive dress code and musical styles. This serves to illustrate the difficulty of applying one general definition. What is a 'cultured person'? The term is often used to describe a person who appreciates the 'finer things in life'. So here it has a kind of superior application. Whilst this kind of application might not relate directly to researching a particular organisation or group of teachers in another country, for example, it does nevertheless point to one of the potential problems of studying a different culture to our own - ethnocentrism. This is the term used to describe the way we see and interpret things from our own viewpoint. As a researcher of other cultures, one must be able to try and perceive things from that particular culture's standpoint. This is rather easier said than done. Griswold (1994) claims that viewing culture as a people's entire way of life, will avoid the ethnocentrism and elitism that humanities based definitions falls prey to. One can become sensitised and perceive 'other ways of doing things' up to a point, but it would be impossible to completely discount our own frames of reference, values etc. The danger lies in the expectancy that everything must fit in with one worldview.

The 'cultural question' in this research is what, if any, cultural influences, have affected the implementation of the 'new teaching methodology'. The culture(s) referred to here are those associated with: 'Bulgarian VET teachers'; and, the separate schools in which they work.

As Griswold (1994) points out, the way people think and act within organisations varies enormously. The question is whether it is the culture or the organizational structure that is responsible for the differences. Of course organisations themselves can be interpreted as cultures in themselves, therefore they could well influence each other. For example, these questions are particularly pertinent where global companies look to establish centres in a number of countries. Griswold again:

" Organisations have tried a variety of approaches, all involving the attempt to create a certain kind of organisational culture in which hard work and commitment to the goals of the organisation are part of a meaningful complex of activities and attitudes." (Griswold, 1994 p 121)

In trying to 'homogenize' a particular work ethic across nations, often for economic reasons, multi-national companies can have both positive and negative effects on the particular national culture involved (Nicolau & Manonelles, 2000). Globalisation, in this sense, is however a very real threat to cultural diversity. As Morgan (2002) points out, as the prospect of a 'monoculture' becomes ever more closer, the need to maintain or re-establish cultural roots becomes even more important. This so-called 'McDonaldisation' of the world, in which the Western cultural consumer model appears to be pre-eminent may have been easily promoted and predicted but the export of attitudes and ways of thinking are something quite different. This research is not specifically concerned with how 'Western' approaches affect the Bulgarian training / education sector, rather, the reverse. That is, it is more concerned with how Bulgarian culture and traditions affect the 'Western' approaches that have been introduced into a Bulgarian setting. There are clear parallels nonetheless.

Communication, language and the role of the translator

This is clearly one of the most problematic areas for any researcher carrying out work in an unfamiliar language. In this particular case, if previous work undertaken as a consultant, using a translator, had not been successful, then it is highly likely that this research would not be taking place at all in its present form. In the event, whilst there were inevitably some problems, they were not insurmountable. The author was advised at an early stage in the research to consider learning the Bulgarian language. This advice was turned down for a number of reasons. Two in particular. In the first place, unless something approaching fluent use of the language could be achieved, which is unlikely given the necessary time required in-country for such fluency to develop, apart from the time available for the research anyway, there would be little chance of getting 'inside' the language to understand the subtleties and nuances inherent in the language. Secondly, having successfully worked with translators over several months, the author was confident that the research could be carried out along similar lines. Indeed, much research across many specialist fields has been carried out without the need to master a language. However, Dore, speaking about 'experts' advising overseas clients, appears to suggest that such mastery of language is feasible:

"I have never met one (expert) who acknowledged that one needed to know the local language well enough to understand the nuances of personal relations, and know something about the structure of kinship and locality and ethnic groups, before one could confidently advise on how cooperatives should be organised (Dore, 1994 p16).

Whilst the comment above refers to a quite different scenario to this current research, 'knowing the language well enough to understand the nuances ...' for most researchers, is a pipedream. The use of a translator is the only realistic way of getting near to that level of understanding.

This is not to say that continuous development, practice and acquisition of the particular language by the researcher does not take place of course. It is just that unless the research was an extended anthropological study in a particular country, the time frames for such language development is an unreasonable expectation.

“ Few of us know or can acquire the language spoken by peoples outside our conventional linguistic orbit...” (Brislin et al, 1973 p v)

The key is in securing the services of a reliable translator. During the consultancy, text based learning resources were sent over to Bulgaria prior to delivery of the seminars for translation and printing. Whilst time was not available for detailed scrutiny of accuracy before delivery of the materials, continual checking of meaning with the translators during the seminars cleared most mis-translations. The main potential problem was that the translators of the materials were not always the same translators who helped to deliver the seminars. Nor were they all reliable. Freeman, in Denzin and Lincoln (1994) correctly observes that researchers using interpreters:

“ ...become vulnerable to an added layer of meanings, biases and interpretations that may lead to disastrous misunderstandings.” (Freeman in Denzin and Lincoln, 1994 p367)

Over time however, a small cadre of translators was used who the author got to know well both professionally and socially. It was absolutely crucial to the success of the seminars that consultant and translator were both on the same ‘wavelength’. As the relationships built up, so too did the anticipation of thought processes and the nuances of meaning by the translator during simultaneous translation.

As pointed out above, detailed cross-checking of printed translations for accuracy prior to the seminars was not possible, but continual checking during delivery of the seminars was carried out to clarify and explain problem areas.

Whilst semi-structured interviews, undertaken as a kind of ‘three-way’ conversation, including the translator, are flexible enough to enable the researcher to clarify responses at the time, as we have seen, questionnaires do not really provide such flexibility. The importance of phrasing and wording of questions has already been discussed but problems in this area were identified many decades ago particularly where international surveys were being carried out. (Scheuch in Rokkan, Ed., 1968). To try and remove the problems, a technique whereby re-translation back to the researchers own language was carried out by a bi-lingual from the researchers own country, to identify mistakes and mis-translations. But as Scheuch points out:

“ Whilst this is undoubtedly a fine technique to check the ability of the translators, it does little to control the chief problem in question wording: equivalence of meaning (Scheuch in Rokkan, ed., 1968 p179)

This is put eloquently by Griswold:

“ The problems involved go deeper than understanding a simple relationship between words and what they refer to, however. If culture involves shared meanings, then moving in different cultures requires understanding different systems of meaning and the assumptions, principles and nuances that any particular cultural object may evoke in these systems” (Griswold, 1994 p133).

This, again, underlines the author’s view that to try and understand, and make sense of the full picture, there can be no substitute for working with a reliable and trusted translator. However, as we shall see, the fieldwork and subsequent translation of questionnaires was not without its problems. Whilst some of the subsequent problems were of the author’s own making in terms of the structure of some questions, some problems did arise out of incomplete translations. However, few significant problems related to translations presented themselves during the preliminary pilot study.

The pilot study

The pilot study was carried out during the very early development stages of the research, when the author was still engaged as a consultant on the UVET project. Although the main objective of the research had been established by that time, the author considered that by undertaking a pilot study it could create a clearer focus, and also, perhaps identify other important issues. Quite apart from this, it could create a clearer picture in terms of the efficacy of the research methods to be used.

“The pilot study allows the researcher to focus on particular areas that may have been unclear previously. In addition, pilot interviews may be used to test certain questions. Still further, this initial time frame allows the researcher to begin to develop and solidify rapport with participants as well as to establish effective communication patterns.” (Janesick in Denzin & Lincoln, eds., 1994 p213)

Whilst the author did plan to use interviews during the main phase of the research, due to his main role as consultant at that time, he was content to concentrate on

trailing a questionnaire. However, as pointed out above, the opportunity to communicate intentions regarding the research, and seek tentative permissions to visit seminar participants in their schools, was not lost. Having already established friendships with many participants, they positively welcomed further contact. The Director General of VET in the MES at that time also gave her blessing for the author to carry out his research at the schools, at some time in the future. We shall see later however, that when it actually came to doing the fieldwork 'proper', a change in personnel at the MES and poor communication, meant that such initial permissions, however well intentioned, count for little when there is a time lapse before actually proceeding with the work. As far as carrying out the pilot study, the author secured permission from the overall project managers (The British Council).

At the time, the author was content to get some initial data that could be used to inform any future focus the research might take by identifying any additional emerging issues. The use of a questionnaire survey was decided upon to get such data from teaching delegates attending a series of four staff development seminars the author delivered as part of the project over a four week period in Bankya, outside Sofia, the capital of Bulgaria in May 1999. Although the literature on research insist that piloting research instruments is an integral part of research (Bell, 1999; Denzin & Lincoln, 1994; Miles & Huberman, 1984; Youngman, 1982), when carrying out research as an 'added activity' to carrying out overseas consultancy work, such luxuries may not always be possible if one wants to 'grab the moment'. Because of the high potential for problems this should of course be avoided if at all possible. In this instance however, the opportunity presented was ideal.

The main focus of the pilot study therefore was to trial a questionnaire to check how useful this method would be and what particular problems might arise from using such an instrument. The questionnaire was administered towards the end of each weekly seminar, as part of the normal seminar evaluation activity although it was made quite clear what the purpose of the questionnaire was. The questionnaire was translated into Bulgarian and word-processed in-country. Responses were also translated into English by the author's translator both during and at the end of the consultancy.

Over the four weeks of the consultancy, seventy-two delegates participated and questionnaires were distributed to them all. Sixty-three questionnaires were returned, a response rate of eighty-eight percent.

For the purposes of simplicity and clarity, this section will concentrate on commenting qualitatively on the nature of selected key items (questions) in terms of how / if they met the desired outcomes rather than looking in detail at each response. The questionnaire contained seventeen items.

Example questions with comments

Have you attended any other courses / seminars associated with this PHARE / UVET programme? Please place a tick next to the ones attended.

The main objective of this item was to establish how many respondents had been on the 'new strategies' seminars and also to see which other relevant staff development they had been on. The responses show that this was an ambiguous and confusing item for respondents. Respondents apparently were unclear as to the 'title' of the given choices in relation to seminars attended. For example one respondent placed a tick next to the current seminar. In addition, several respondents left this one blank and some entered courses that the author had not included as being 'directly' associated with this programme.

This needs refining to a straightforward Y/N and 'which' (a list of the actual 'new strategies' seminars to tick)

What is your specialism ?

This item was designed to see if particular specialisms were more likely to use student centred learning (scl) than others. In fact the design of the instrument did not allow any easy way of coding this. It will be difficult to make any correlations given the spread of specialisms here and the narrow range of specialisms that the author will have access to in the follow-up fieldwork (in specialist schools).

Have you managed to apply any of the teaching / learning / assessment / workshop organisation strategies presented at the seminars in your school / centre?

Again, this does not specifically target scl strategies. Although such strategies predominated in terms of delivery at all seminars, the actual content of the seminars varied tremendously. The responses here were very positive.

What do you feel were the main benefits / good points on the seminar(s) you attended?

This open item elicited a very wide range of responses. Only those occurring two or more times were recorded. There is no doubt that many of the other responses could fit into the categories given but the author chose to limit his own interpretation of the translated scripts. This item provides good information for refinement into a closed item, which will be easier to code.

"Pattern codes are explanatory or inferential codes, ones that identify an emergent theme, pattern or explanation that the site suggests to the analyst."

(Miles & Huberman, 1984 p67)

Responses included: *Communication with colleagues; new strategies; teamwork / active learning; assessment methods; exchange of experience; application of new strategies; new ideas; handbook provided; seminar delivery.*

What do you feel were the main weaknesses of the seminars?

The intention here was to try and identify any differences in what the teacher's needs were and what the project terms of reference were in terms of mismatch.

As with the previous item this was an open item and resulted in a wide range of responses. A summary of those occurring twice or more were recorded. Again, this was valuable in terms of identifying a number of areas that could be refined into a closed item.

Responses included: *different specialisms represented; some repetition; seminars too short; more advance information.*

Are there any specific further training and development needs or other needs you would feel would make implementation of the new curriculum more effective? What?

T R U E

This was a badly worded item, which only elicited a closed response when much more was required. The second part of the question does elicit a more open response however, but the responses were widely variable. It does provide good 'revision' details to support and consolidate responses to previous questions however.

Responses included: *IT Information Technology; specialist training; learning packages; new strategies; overseas study tours; difference between general and vocational education; infrastructure and funding.*

**It is worth noting here that several of the areas identified had in fact been covered in previous seminars.*

Currently in VET in Bulgaria, a 6-point scale is used to assess students. What are the main advantages of this?

This item was designed to establish whether respondents still favoured a norm-referencing approach to assessment as opposed to the criterion referencing associated with CBT, which they had just been exposed to. This was one of the items that illustrates well the problems of translation and / or perception of the question. Many responses were actually criticisms of the existing system or advantages of the 'new' system rather than the existing one. Also, for example it is doubtful that responses indicating 'more objective' or 'more accurate' are referring to advantages of the existing system. In summary, responses were ambiguous.

Responses included: *none; criterion referencing better; more precise / assessment of knowledge; more differentiation between knowledge / skills / levels / students; traditional / good system; motivation; different levels*

Increasingly, in VET, strict performance criteria (successful / unsuccessful) are used. Do you feel this is more effective? YES / NO Please give reasons.

If the previous question was confusing in trying to establish whether responses were claiming advantages of the 'traditional' assessment approaches, the responses to this question were unequivocally positive in terms of the effectiveness of the use of criterion referencing in terms of the use of performance criteria. A significant number of responses identified the lack of differentiation between 'levels' of competence as being a negative point.

The only recurring YES response was: *more objective / accurate.*

The main recurring NO responses were: *lacks differentiation between levels / students; no motivation to improve.*

Do you feel that within an outcomes / performance –based curriculum, grading students will be good or bad / YES / NO Please give reasons

This item was included to test the hypothesis that teachers within the Bulgarian VET system are happy to retain a grading system within a CBT framework. The responses proved that they are. The main recurring reason being that students can see their achievement and this will motivate them to improve on it. No other significant pattern of responses were identified although, as with other items many individual responses were interesting and do recur between the various weeks' respondents.

With your current experience of assessing give positive or negative views on present or future assessment approaches eg. Verification.

This open response item was meant to elicit personal views on the overall assessment approaches associated with outcomes based curricula. Such approaches were the subject of the then current series of seminars and closely tied up with the 'new teaching methodology'. The hypothesis was that teachers would be happy with the

implementation of criterion referenced assessment but reluctant / wary of implementing the recording and verification systems that are typical of such systems.

The range of responses here point to a wide difference in interpretation of the question.

Verification issues were the main concern. The author's interpretation of the nature of the responses is that feelings were mixed. Some regard it as a good development providing the national standards are implemented and the verifier's role is a supportive rather than an inspecting role. Other responses point to the additional bureaucracy and administration requirements.

Do you feel there are any particular 'barriers' or problems associated with implementing new curricula at your college / centre? What?

The expected dominant response here was the lack of finance and / or equipment. It was an open response item therefore the responses did vary, but a pattern did emerge that confirmed the author's initial view.

Responses included: *learning resources; lack of funding; students (lack of acceptance; lack of staff development; lack of infrastructure / recording system; resistant to change / tradition.*

Do you feel any approaches (teaching / learning / assessment etc.) used in the West that would be unsuitable / difficult to adopt in Bulgaria? Please give details.

Although the previous item gave some indications that 'change' from the 'traditional' approaches could prove barriers to implementation, this item was designed to identify if there were any specific Bulgarian contextual and / or cultural issues that would impact on developments.

The only real pattern that emerged was of the 'don't know' variety. With hindsight this open item appears to assume that respondents are familiar with Western

approaches when many are clearly not. Some who had been to several seminars were better placed to respond to this than those who may have only attended this particular seminar. The only other significant response came from one particular group who identified both student and teacher conditions in Bulgaria (wages, working environment) as an issue.

Do you feel there was any need to alter your curriculum – was it suitable for industry's needs before the project? YES/NO please give details.

This was a badly worded item seeking more than one response and requires modification. Again, the responses here do provide useful information for a closed item.

Main responses: *to match Western Europe; more focus to meet industry's needs*

What were the strongest / most distinctive parts of your VET system before the project?

This item was designed to identify specific areas that respondents felt best illustrated the positive aspects of their existing / traditional system.

The main patterns of response here across all groups were that vocational and general ed. went alongside each other and also that wider skills and deeper knowledge was achieved.

Main responses: wide and deep skills and knowledge; vocational and general education together

Do you feel the points above can be maintained after the reforms? Please give details.

This item assumes all respondents provide details to the previous item, which was not always the case, and, as in some previous questions, respondents gave a mixture of positive and negative points.

The responses from this mixture of closed and open response item illustrates the confusion it can create, some respondents answered the first part and not the second and vice versa. No real patterns other than a general belief that the reforms are possible whilst maintaining some aspects of the 'traditional' system.

Overall, the pilot study proved invaluable from a number of viewpoints. In the first instance it helped the author to identify weaknesses in the actual format of the questionnaire from the point of view of item structure and wording. Secondly, it confirmed in the author's mind that the use of such an instrument would be of little use on its own. Furthermore, the data collected could be used to modify the nature and focus of subsequent questions. The data was in fact useful in its own right of course.

It was as a result of this pilot that interviews and observations were decided upon as being key approaches during the fieldwork. As part of a 'suite' of strategies, the use of a questionnaire, properly constructed, would yield good data. Accordingly, the author drafted out an instrument based upon what he had learned during the pilot. For example most of the questions were drafted as 'multiple choice' items. This would have the double benefit of being easy to code and not involve lengthy translation into English. Having said this, most items did have a free-response section, which did require translating. In the event, the translations proved to be time-consuming and not always entirely accurate. *(For a more detailed discussion of this, see the section on 'communication, language and the role of the translator' earlier in this chapter and the discussion of the fieldwork in Chapter Six).*

During the fieldwork, the 'multiple-choice' items generally worked well, although there were some exceptions. In some cases, respondents had to rank selections. Although some of the given lists contained as many as eight choices, respondents were only asked to select three. As Youngman points out:

"It is not always easy to rank more than four or five items."
(Youngman, ed., 1982 p12)

A further result of the pilot study was that the author chose to 'cluster' items around 'themes'. Because the pilot instrument only contained relatively few items, it was not really considered appropriate at the drafting stage to do this, when in fact it would have made it much easier to code. The instrument used in the fieldwork contained over double the items that the pilot instrument contained so there was no question of *not* clustering into themes.

"Clustering is a tactic that can be applied at many levels to qualitative data: at the level of events or acts, of individual actors, of processes, of settings/locales, or sites as wholes." (Miles & Huberman, 1984 p219)

In this case it was the clustering of question themes.

Although the pilot study did make the author wary about using questionnaires and resulted in him initially 'downgrading' its use during the planning stage, soon after arrival in Bulgaria to undertake the fieldwork, he quickly made the decision to use it as a primary source. One thing that the pilot study did not address, which on reflection it should have done, was to investigate the use of interviews. The author feels that this was an important omission from the pilot and one that would probably have resulted in him looking very carefully at how best to incorporate interviews to best effect. As it turned out, the initial interview schedule proved to be hopelessly ambitious, given the fieldwork timescale. Hence the increased reliance on questionnaires. In fact the proposed schedule had to be constantly scrutinised in the field to make best use of the available time and opportunities presented. As Janesick clearly points out:

"Because working in the field is unpredictable a good deal of the time, the qualitative researcher must be ready to adjust schedules, to be flexible about interview times and about adding or subtracting observations or interviews..."(Janesick in Denzin & Lincoln, eds., 1994 p213)

The above quote sums up perfectly the situation as it presented itself during the spring of 2002 when the author arrived in Bulgaria to carry out the fieldwork. Whilst the pilot study proved invaluable on many levels, it did not and could not have forewarned the author about all the limitations of carrying out research in the field.

Summary

Having considered the relative benefits and limitations of the various approaches to data collection, it is clear that the most effective approach is in fact to use a combination of methods. Not only will this increase reliability but it can facilitate flexibility should unexpected problems or opportunities occur. This is illustrated well in the next chapter where the author was unexpectedly presented with the opportunity of distributing questionnaires to school directors around the country. By some simple altering of his prompt sheet of interview questions for directors, a useful self-completion questionnaire was produced and translated whilst 'in the field', ready for distribution.

The next chapter provides a detailed account of how the fieldwork was carried out and the 'actual' benefits and limitations of the various approaches in this particular context and culture.

CHAPTER 6

THE FIELDWORK

Some months before the fieldwork, numerous attempts were made to contact key personnel, including the Head of VET at the Ministry of Education and Science, using e-mail in the first instance, to try to arrange permission and access to the schools and staff in order to carry out the research. The author had already sought and been given permission during his last visit to Bulgaria in 1999, but this was during informal discussions with the Head of VET at the time. Now however, the author wanted to follow ethical protocols by securing some form of written official permission, this proved fruitless initially. The author later learnt that a new Head of VET was in post. The Human Resource Development Centre (HRDC), established after the project from the Project Management Unit (PMU) was also contacted, this also proved fruitless initially. A previous project co-ordinator at the British Council (BC) in Bulgaria was eventually contacted, who suggested further contacts (including the ones already tried). Eventually, the author made contact with the BC direct, who contacted HRDC. The author must point out here that although he worked as a consultant for the BC on the project, many of the key personnel there at the time of the project had since moved on. BC was able to get a positive response from HRDC but the author still received no communication direct from them. All of this took place over the weeks leading up to the fieldwork, which took place in March 2002, creating frustration for the author (Letters requesting permission to carry out the research, details about the researcher and the proposed itinerary are included as Appendices 1, 2 and 3 respectively).

In the meantime, communication with the translator in Bulgaria continued. Unfortunately, she was only available for one of the weeks so another translator had to be found. The services of another translator for the rest of the time, was eventually secured via the author's UK translator. Although the additional translator was not a professional translator, it was suggested that she would be up to the job, at least as far as the actual simultaneous in-country work was concerned. There were some problems with the written translations however, which will be discussed later.

Apart from the above arrangements, arrangements were also on-going regarding funding of the in-country fieldwork in Bulgaria. The author managed to secure funding through two separate staff-development sources for travel, accommodation and translation services. The author had to fund his own subsistence for the trip.

During the planning stage for the fieldwork, an itinerary was drawn up which optimistically scheduled interviews with six teachers at each of the proposed schools visited. As is often the case, both in research work and overseas consultancy work, one's planned objectives need to be frequently re-assessed. When the two are combined, ie. undertaking research work overseas, then such re-assessment needs to be undertaken on a more or less continuous basis. Such was the case in this instance. However, this does not always prove to have a negative outcome. Serendipity often provides for unexpected bonuses. What one fails to achieve in one area, is often counterbalanced in some other way. In overseas work, one must always have an open mind and be flexible in order to get the best out of any situation. Woe is he or she who is not thus prepared, for the mission is likely to be dogged from the start.

The author brought such experience to bear on this research 'mission' sooner than he had anticipated. It has already been pointed out above, that despite much effort having been put into making all the necessary arrangements, using the correct protocols, immediately prior to departure from the UK, the only 'formal' notification received that visits to schools had been arranged was a fax from the Director of HRDC, previously the head of the PMU of the Phare project, simply saying: "*Chris. Your visit is OK!*"

The author had taken the precautionary step of asking his interpreter to 'informally' contact the directors of the three main schools he planned to visit and tell them of his proposed plans. This proved to be invaluable since it was apparent upon arrival that little else had been done. Thus, the directors of these schools had not yet 'officially' been informed of the visit. One of the author's key requests was to secure permission, in the form of an official letter, from the Head of VET in the Ministry, which could be shown to the various directors. Requests for this, together with proposed itineraries, and brief descriptions of the research and the researcher had already been translated

into Bulgarian, in the UK, and faxed ahead to the Head of HRDC prior to departure, for forwarding to the Ministry and schools. Copies had also been sent to BC for forwarding to HRDC due to the lack of response direct from HRDC.

It was heartening, upon arrival in Bulgaria to be told by the translator, that although the three main schools had not been informed officially about the visits, they would welcome the author. Upon meeting the Head of HRDC, it appeared that they had been having problems contacting the author due to possible poor e-mail connection. Nevertheless, he phoned up the Head of VET at the Ministry to set up a meeting later that morning. He said that a letter should be drafted out for her to use as a template, in order that she could get a letter drawn up for me, as requested. As pointed out above, one has to be prepared to be flexible during 'in-country' work and this trip was no exception. Upon meeting the head of HRDC, the author was immediately informed that there was a conference taking place in Sofia on 'Dissemination of Good Practice in Teacher and Trainer Training to the Western Balkans', and was invited to attend. This was most welcome, albeit tinged with frustration at the same time. Frustrating in the sense that if it had been known earlier, it would have built it into the itinerary. Clearly, it was welcome from the point of view of meeting/making contact with people involved in VET from other Balkan countries. The author decided that he could allow himself one day at the conference and altered his arrangements to suit. Discussion about the conference proceedings is outside the scope of this research but the author did make some useful contacts, more importantly, he met the Director of another pilot school in Sofia who invited him to carry out some of his research there.

Once the initial alterations to the itinerary had been put in place, a meeting at the Ministry was the next step. Meetings duly took place and the author received an official letter, in Bulgarian, stamped and signed not by the Head of VET but by the more senior Head of Secondary Education in the Ministry (Appendix 4). Furthermore, the head of VET gave the researcher names and contacts of two non-pilot schools for possible visits. Armed with the letter, and the Head of VET's blessing to carry out the research, the work could now commence.

It was during the first school visit that it became clear the proposed itinerary would have to give way to a more flexible and opportunistic approach. Apart from a day 'lost' to the research due to attendance at the conference, it was becoming clear that to carry out interviews with six teachers at each school may not actually prove be the most effective use of time. For example, teachers interviewed at this first school, it turned out, had also completed questionnaires, which was not the intention. The fact that only a relatively small cadre of teachers worked on the 'modules', meant a choice of interviewing teachers drawn from this group, if available, and letting non-module teachers complete the questionnaires. This was beginning to look unfeasible given the growing impression that most were unfamiliar with the project. Or, letting mainly 'module' teachers complete the questionnaires, (the same questions were actually on these questionnaires although they would not all be necessarily used in interviews), and reducing the number of interviews carried out, just using them as exemplars. If the author was to do this, he decided that he must try to broaden his evidence base to balance this. By the time of the visit to the second school, it became apparent how to do this. Interviews aside, it was clear that much could be done in a day. Invitations to other schools was already a result of attendance at the conference, so it was decided to cut the time at schools down and visit more schools, and only interview a small sample of selected teachers. This would have the effect of raising the profile of the questionnaire. Thus, although the result of these changes was a lower number of interviews carried out, it also had the effect of broadening and increasing the overall evidence base across more schools. The need for such flexibility is recognised by Janesick:

"Because working in the field is unpredictable a good deal of the time, the qualitative researcher must be ready to adjust schedules, to be flexible about interview times and about adding or subtracting observations or interviews..."(Janesick in Denzin & Lincoln, 1994 p213)

Thus, by the end of the fieldwork, the evidence base looked quite different (and more comprehensive) than was originally scheduled.

The fieldwork evidence base:

- seven schools visited: five original pilot schools, one new pilot school, one non-pilot school
- seven school Directors interviewed (one acting Director)
- nine teachers interviewed 'formally'
- twenty-nine classes observed
- seven student group interviews undertaken
- seventy-nine questionnaires completed and returned (by teachers)
- fourteen questionnaires completed and returned (by school directors)

Notes on the data collection

Interviews with Directors: These were informal and semi-structured. An interview question checklist was produced as a guide (Appendix 7) and colour coded pink in-country*. This was also designed as a self-completion questionnaire and typed up in Cyrillic (Bulgarian), in-country, and left for the VET department to circulate to all pilot school Directors (at the Director of VET's invitation). These were left with the Ministry to be circulated to all fifty pilot school Directors. Of these, fourteen have been returned (28% response). Although this is somewhat disappointing, it must be seen as a bonus overall in terms of the planned evidence base

Interviews with teachers: These were informal and semi-structured. An interview question checklist was produced as a guide (Appendix 5) and colour coded yellow in-country* – this was also designed as a self-completion questionnaire to be circulated to groups of teachers in each school. This was colour coded blue in-country.

Questionnaires: Fifteen were distributed at each school (105 in total) seventy-nine returned. (75% response)

Observed classes: These were non-participant. Observer and translator sat in discrete position, usually at the back. In some cases the Director was also present. An observation checklist was used to code different activities (Appendix 9).

Group interviews with students: These were informal and semi-structured. The author respectfully requested the directors not to be present during these interviews – this was granted in all cases. Numbers of students present ranged from four up to sixteen. An interview checklist was prepared (Appendix 11).

**The questionnaires were colour-coded for ease of use and differentiation in the field*

The author proposes to present the findings in the following order:

1. results of the teacher questionnaire survey
2. results of the teacher interviews
3. results of the director questionnaire survey
4. results of the director interviews
5. results of the student interviews
6. results of the observations

For clarity, at the end of each section, a list of bullet points identifying key findings will be provided, and at the end of the final section, a narrative summary of the collected findings will be provided. All original quotes will be italicised in quotation marks but responses from questionnaire / prompt choices will be in inverted commas only.

1. TEACHER QUESTIONNAIRE SURVEY FINDINGS

As already stated, the original intention was to visit five schools and distribute fifteen questionnaires (seventy-five in total). In the event, seven schools were visited and a total of 105 questionnaires were distributed. With seventy-nine being returned, it gives a response rate of 75%, which the author considers acceptable and certainly a better return than anticipated.

The questionnaire was word-processed in English with a Bulgarian translation added alongside later. This was done prior to departure. As pointed out above, to avoid confusion in the field, the questionnaires were colour coded to differentiate them from

other survey instruments used during the fieldwork (questionnaires / prompt questions for school directors, teacher interview prompts etc.). The questionnaire contained thirty-nine questions, thirty of these were selection items (quantitative)²¹ with many of these also having an open response / comments section (qualitative). The cover page of the questionnaire contained a clear explanation of the purpose of the survey / research and also contained a 'tick-box' asking respondents whether comments could be quoted anonymously if required. Sixty-nine (87%) respondents agreed, with two saying no (a little over 1.5%), with eight (10%) not responding.

Note. Several of the questions allowed three choices so percentage results given for these particular items relate to the responses for that specific selection so within these items total added percentage may add up to over 100%.

Prior to undertaking the fieldwork, the author's UK based translator did not have access to a Cyrillic script keyboard, therefore, the translations were handwritten under each question on the printed English version. The author is of the opinion that this did not have any negative bearing on the responses and is a technique that has been used successfully during previous survey activities he was involved in during the project.

Apart from the inevitable difficulties in translation of some items, and possible misinterpretation of some questions by respondents (not always helped by the wording of the author's questions...), the main problem encountered was in getting the responses fully and accurately translated. Whilst the author tried to get his translators to do this during the fieldwork, they were not always fully completed (some of the issues associated with translations and interpretation are discussed in Chapters Five & Seven). This meant that a number of the questionnaires had to be re-visited by his UK translator after the fieldwork. Fortunately, many of the items were of the 'please circle one of the above...' variety, so these could be quantified relatively easily. It was on some of the open-response items where qualitative comments were required that posed some problems.

²¹ The main focus of this research is on qualitative interpretation therefore the author chooses only to interpret quantitative data in terms of percentages for comparative purposes

Process

For analysis purposes, questions were coded into 7 distinct clusters:

- **BG 1 experiences, qualifications and staff development (14 items)**
- **BG2 changes in teaching approach (4 items)**
- **BG3 student-centred learning and its interpretation (4 items)**
- **BG4 opportunities, incentives, difficulties and barriers re. implementation (5 items)**
- **BG5 student-centred learning – benefits and impact (4 items)**
- **BG6 the verification process (2 items)**
- **BG7 views, attitudes, motivation and differences (6 items)**

The responses from each of the above clusters were transcribed onto separate 'raw results' tables, one for each of the schools visited, each table identifying the separate responses from each respondent. The data on the 'raw response' tables was then compiled onto separate cluster 'comparison' tables showing comparisons between schools for each item by cluster.

Note

The results and subsequent findings are presented here in an abridged form. They contain mainly qualitative comments together with illustrative quotes. The tables and more detailed results and findings can be found in Appendix 6, percentages are used for comparative purposes. In the main, the results in this section are presented in straightforward descriptive terms, although some comments and observations are provided. A fuller discussion of the findings is provided in Chapter Seven. Where respondent's quotes are used to illustrate a point, in the main, these will be used directly as translated. Whilst in some cases grammatically and stylistically 'incorrect', the author was reluctant to change anything as he felt that it might alter 'the spirit' of the response. In any event they do, nevertheless, provide clear meaning.

Results

BG1 experiences, qualifications and staff development

This cluster looks at qualifications of staff and how much experience they have, both in teaching and their previous industrial and commercial activities. Whilst no direct questions about age were included, the findings here are useful in terms of how relative experience and training might inform / influence teachers during periods of change.

The majority of teachers have over nine years of teaching experience (67%). Contrasting with this, the biggest percentage of teachers, 42%, have less than two years industrial or commercial experience. Practically all are employed as full-time teachers. Questions enquiring about teaching qualifications and location did yield some useful information, but the structure of the questions, created some confusion. The key information gleaned from this however is that 78% of respondents had had some form of teacher training. However, the written responses relating to where they undertook the training suggests that for many respondents their teacher training was part of their main professional qualification course. Most university degree courses include a 'pedagogy' component. It is worth reminding the reader here, that it has already been stated in Chapter Three, that there is little in the way of a comprehensive teacher-training course for VET teachers in Bulgaria. Furthermore, the MES themselves are quoted as saying that it is possible to get a teaching qualification without actually demonstrating any practical teaching skills (MES 1999a).

In response to the question 'which of the Phare / UVET staff development seminars did you attend, 58% said 'none'. With a further 14% 'nil' response this left only 20% of respondents having actually attended any of the seminars. Whilst it was clearly anticipated that in percentage terms the number of seminar 'attendees' would be small, it was still thought that the responses of 'non-attendees' would illustrate whether any 'cascading' had taken place. The questionnaire was indeed successful in doing this, albeit in some items in a negative way with the high level of 'nil' responses.

Two questions related to staff development proved confusing for respondents, creating much overlap and repetition. Many respondents repeated some of the information put down in previous questions. The author has therefore taken the decision not to quantify here the data from these questions as he thinks it adds nothing useful to what is already known. However, he thinks the question asking when respondents last attended a staff development event *is* important. The biggest response was 'nil' – 33%, with a further 22% stating 'not since the end of the UVET project' (in 1999). This combined 55% is significant. With a further 13% not having had any staff development for over 18 months it provides a picture of infrequent staff development which cannot help in terms of embedding a completely new approach to the VET curriculum in the country. This contrasts somewhat with the findings of the BC Case Study (Chapter Four) in which it is suggested that staff development at the 'TCP Centres' is: "...*in general functioning well.*" (BC case study, 2000 p54) On the positive side however, 78% stated that they were allowed time off for staff development. The problem is, who is providing such development? A further significant point here, which only came to light during the interviews, is that staff have to pay for their staff development. Whilst it was difficult to establish to what extent staff have to pay, or the kind of staff development they have to pay for, if this is the case, it will have a huge and potentially devastating impact on sustainability.

BG2 changes in teaching approach

Questions exploring what actual teaching methods were used 'before' and 'since' the project provided some interesting results. Options were provided under 'before' and 'since' lists of teaching methods. A mixture containing both typical 'traditional' and 'student-centred learning' (scl) methods were given, plus a free response 'other' category. Both lists were the same. The 'lecture' proved to be used most frequently across the schools pre-project (52%).

A number of respondents only completed the 'before' list. The fact that many of these had little direct involvement in the project, leads the author to conclude that their selections related to their current use. The fact that 'groupwork' accounted for 25% 'before' and 'dropped' to 24% 'since' appears to support this assertion. It is unlikely

respondents would only put this typical 'scl' method down under 'before' with no response under 'since'. If respondents wanted to make the point that they were already using this regardless of the project it is likely they would have repeated the selection under each heading. There are figures to suggest some changes however. Use of 'lecture' for example drops to 23% across all schools. The author is aware of course, that any combination of methods could be used within any session but the predominance of use and how they are used can provide a good guide as to whether teacher-centred or student-centred approaches are more prevalent. This becomes even clearer when combined with observation data. The main significant result here is the big drop in use of 'lecture' as the main method used, since the end of the project.

Another key indicator in identifying the change from 'traditional' to 'scl' strategies is in the way students take away a record of the lesson. That is, how do teachers ensure students get and retain the information? Again, a list of 'before' and 'since' methods were given containing a mixture of 'traditional' and 'scl' methods.

The main significant changes are: 'copying notes off the chalkboard'(c/b) accounted for 52% of responses 'before' but reduces to 27% 'since'; use of 'handouts' increases from 13% 'before' to 28% 'since'; and, 'dictation', that most typical of didactic teaching methods, reduces in use from 32% to 19% 'since'. On these findings, it is a good indicator of a shift in emphasis. However, as we shall see later, these findings were not always borne out in practice. For example, when asked 'have you changed your teaching method as a result of attending any of the PHARE seminars, only 27% responded positively. This of course reflects the fact that only a small percentage of respondents actually attended any of them. Of those who did attend, few were able to respond in which way they had changed their approach. This figure is close to the 20% of respondents who actually attended the seminars. Although only 7% responded 'no' to the question, a further 61% 'nil' response would seem to indicate a situation in which teachers did not feel they had altered their approaches significantly. If this is the case, a key question must be 'why not'? According to responses in the last question in this cluster, teachers do appear to exercise some freedom in how they teach. When asked 'who is responsible for directing how subjects are taught in the school'? 43% of respondents said they choose themselves, although 10% of these

indicated others were involved. Having stated this, 34% said the Ministry 'expert' was responsible. A further 19% said it was the 'methodology' teacher in the school. Clearly, some differences in perception as to the nature of the question, or, more worrying, differences in how teachers are *allowed* to teach in the classroom.

BG3 student-centred learning and its interpretation

This next cluster deals with perceptions of the meaning of the terms 'teacher-centred' and 'student-centred learning' and what methods teachers prefer. Respondents are also asked to give examples of student-centred activities. However, 47% were either unable or unwilling to respond. There were a number of interesting responses. For example, for 'teacher-centred', responses included:

"Teaching of the school subjects in a style and method which are difficult for the student, difficult to have access to".

"Pace of the teaching (learning) set by the teacher, and then the student doesn't enjoy the learning".

"Teacher teach, students listen"

Responses for 'student-centred' included:

"Student as a subject, not as a object".

"The students prepare part of the lesson, they are more motivated, they have to have a groupwork".

"Open education".

Some respondents were unable to differentiate between the approaches writing: *"The teacher gives information, which he thinks is necessary"*, to define teacher-centred, then: *"Almost the same"*, for student-centred.

When asked 'which is your preferred approach'? 51% stated 'sc' and only 4% stated 'tc'. Pragmatically, 13% stated 'both' giving reasons such as:

" Depending on the subject, student-centred more effective".

"Students in the middle of teaching but this method not suitable for all classes".

"In order to achieve good results from the teaching, it's needful to be used the both methods, according the subject, the topic and the desired results".

"Depends on the situation and the difficulty of the material and the time needed".

Again however, there was a high 'nil' response, 33%. The most interesting response to this item was: *"I use teacher-centred, even (though) I don't prefer it".* This begs the question why? For this respondent, the answer seems clear: *"When the time is limited, the plan/programme is set by the Ministry and the classes have so many students, it's difficult".* Such issues do come through but few make the point so clearly.

Many respondents were however, able to give good examples of 'scl' methods used. They include the following:

"Discussion, brainstorm".

"Self-learning, more games, student answers questions, more demonstrations".

"Groupwork, self-learning, work giving them the possibility to improve their creativity".

"Work in small groups on a task, member from this group report the results, other groups discuss it".

The following 'examples' however, show that some respondents have yet to fully comprehend the concept of student-centred learning:

"The idea of the lesson is offered by students themselves".

"The self-philosophising interpretation of a given fact or theory".

"Homework with difficult tasks".

"Situations in which students ask questions".

Respondents were next asked to identify from a list what best reflects student-centred learning at their schools. Asked to identify 3 from the list, across all schools the following figures were recorded: 'active student learning' 58%; 'students have more responsibility' 53%; 'lots of group and teamwork' 29%. Very small numbers picked out typically 'teacher-centred' characteristics. For example 'more teaching – less learning' accounted for only 5% of responses, whilst 'pace of learning set by teacher' accounted for 16%. On the other hand, significantly, 'assessment based on possession of knowledge', a very traditional –some would say very strong characteristic of the old Soviet era education system, was recorded at 29%. This indicates that some traditions will not change easily. Although there are slight differences between the schools, there are no significant difference between the pilot schools and the non-pilot and 'new' pilot school.

BG4 opportunities, incentives, difficulties and barriers re. implementation

This cluster of question attempts to identify some of the problems associated with implementation of the new strategies. For example 'If you have not had the opportunity to use student-centred learning approaches - what is the reason?' The biggest overall response here, 57%, was 'nil', suggesting that the majority of teachers at least have the opportunities to implement the new strategies. 'Lack of resources' and 'lack of time', reasons that the author thought might have accounted for significant responses did not feature heavily. Surprisingly, 'lack of training' only

accounted for 9% of responses. Given that apparently only 20% of respondents had actually attended any of the staff development seminars, one would have expected a much higher figure. Most respondents were positive in their reasons for changing their approach with 77% saying it was 'to feel I am doing a good job' and 23% saying it was 'to benefit students'.

Some examples given of the 'other reasons' for not having the opportunity to use student-centred methods included the following:

"It's a difficult method because our students still have to learn how to work in that way".

"Habit / another method / student attitude".

"Lack of motivation in the students".

Quite who "the others" referred to above are is unclear. Is it other members of staff or the students? In themselves none of the above appear to be sufficient reason for lack of opportunity but within the particular school contexts they may be more of a restricting factor.

From a list of characteristics of both 'teacher-centred' and 'student-centred' strategies, respondents were asked which ones were the most difficult to implement. There was quite a spread of responses to this but 'individuals learning at their own pace', 'students having more responsibility for their own learning' and 'active student learning' accounted for most responses. A surprising 14% considered 'assessment based on the possession of knowledge' difficult to implement. Given that this is the usual 'traditional' approach adopted by Bulgarian teachers, this suggests problems may have existed even before the current changes. A range of reasons are given for the difficulties encountered but the most frequently recurring reason cited is a lack of interest and/or motivation. A lack of both time and resources were also given as reasons (10% and 8% respectively). These latter two reasons correlate closely with

the responses to a previous question. Examples of some reasons given to support their responses include:

“The students do not study on a regular basis, they prepare previously only for the test”.

“The students have no intuition and are not motivated”.

“Lack of motivation for the future (career development)”.

“It’s difficult with so little lessons in big classes to assess everybody individually and to work individually with students and to give them creative freedom”.

Responses to the question asking: ‘do you think that you have been sufficiently trained to use the ‘new teaching strategies?’ Only 41% said that they have with 39% saying that they had not, which contrasts with the small 9% in a previous question who claimed lack of training as a reason for lack of opportunity to use the new strategies. There was also a significant 20% ‘nil’ response. As a further ‘check’ on perceptions and supplementary / consolidatory evidence on problems of implementation, the next question asked for the ‘main barrier to successful implementation of student-centred learning approaches’. The responses covered the full range of options given. The biggest response by some way however, with a 52% response, was ‘lack of resources’. This contrast with the relatively low percentage of respondents who cited this as an issue in previous questions.

There was little difference between the responses ‘lack of teacher skills’ and ‘lack of staff development’ at 19% and 18% respectively. Further analysis however, appears to add considerable weight in confirming the response to the question about whether teachers have had sufficient training in the new methods. Both responses can be considered similar for this purpose, so where respondents had put both down, the author counted these as one response and where respondents had one or the other down, these were counted as one response also. When totalled as one joint response the result is 32%, much closer to the 39% in the previous question.

Other interesting responses included 'reluctance of teachers to change' with a 19% response rate and 'teachers leaving the system' which was identified by 9% of respondents. The response 'no barriers it has been well implemented' was stated by 15% of respondents. Upon closer analysis this revealed that only one respondent at each school chose this, except the 'new' pilot school where 43% of respondents choose it...which is interesting given that they were not involved in the project staff development activities.

BG5 student-centred learning – benefits and impact

Just under half of respondents cited the main benefit to students was enabling them to 'become more responsible'. This was identified by the majority of respondents at two schools. Being 'more motivated' was the majority response at 3 schools. Across all schools, 'more motivated' was the second main response, which attracted a 41% response. 38% identified 'more emphasis on practical competence' as a key benefit. Turning the focus onto the teacher in terms of benefits, 58% responded that they felt '...more effective'. The second biggest response of 54% said 'job more enjoyable'. Only 9% of respondents claimed that 'it does not benefit me'. One of the more interesting additional comments regarding benefits was: *"I take this as a pedagogical challenge which in no way makes my job easier, but more interesting."*

The biggest recorded impact on teachers was: 'require more skills updating' which just under half identified. Yet again this underlines staff development as a key issue. 43% thought that 'more work generally' had resulted, which is not an unusual view when changes of this nature are introduced. 'More assessment', one of the major changes associated with the introduction of modular and competency-based training, is identified by only a relatively small % of respondents. Again, this begs the question has the assessment regime changed dramatically as a result of the project? Perhaps not. BG6 below investigates this a little further.

Asked whether they would prefer to revert back to the 'traditional' training, only 9% indicated they would. However, a further 24% failed to respond which may tell another story. On the other hand, 62% said they wanted to 'continue with the new

approach', with a further 5% undecided, putting both. At individual schools, the figure in support of the new approaches was between 50-60% at most, but one school in particular showed wholesale support with a response of 100% in favour of continuation! It is not clear exactly why one school should produce such a positive response, in contrast to the others. However, it is almost certain that some influence can be attributed to the particular leadership style at the school and how this may have affected the overall organisational culture. This is discussed in more detail in Chapter Seven.

BG6 the verification process

Whilst the author is mainly concerned with issues surrounding the introduction of student-centred learning, other aspects of introducing modular, competency-based training are also looked at. Part of the new assessment regime was to include introducing the 'verification' process, so integral to competency-based training in the UK. Essentially, 'internal verifiers' regularly moderate assessors within the institution where they are based and 'external verifiers', often serving senior teachers acting as 'consultants' for the examination / awarding body, regularly visit all the institutions running the courses to moderate between the various institutions. This system was introduced as part of the UVET project so it was decided to gather data on how the system was working.

The main thing to report here is that the verification system appears either not to have been implemented or that there is some confusion as to the exact process involved. When asked 'what happens during internal verification?', 46% did not respond, 13% said 'nothing special' and 37% described activities where 'inspectors' observed their lessons and discussed various aspects of the lesson, how to improve etc. afterwards. On the basis of this evidence, it is unlikely that any significant verification of assessment procedures is taking place.

BG7 views, attitudes, motivation and differences

This final cluster of questions explores some of the wider contextual and / or cultural and attitudinal issues which may impact upon the successful implementation and sustainability of the new approaches.

The author first wanted to find out what teachers opinions were of how they thought they were valued by society in general, thinking that this might be a determinant in how they responded to innovation and change. The author was surprised to discover that 80% of respondents thought that they were not valued as much as other professions. This was the view of all respondents at two schools. Many respondents were prepared to add written comments to this item, even though they declined to do so on many of the other items. Here are some examples:

“The teacher’s work is underestimated”.

“The society doesn’t want to support teachers”.

“It’s never been so undervalued like now”.

“The Bulgarians highly evaluate it and think secondary education is very important but they don’t respect teachers work”.

“The teacher profession is not so attractive, because of the less payment”.

“They are criticised by the society and parents, they are undervalued”.

Not all comments were negative however:

“Normally teachers are respected in Bulgaria. The last few years put the teachers in a very difficult social situation – they’re on last position regarding the budget. That’s why they’re not appreciated at their right value”.

“The society respect teachers, but this doesn't help us financially”.

Perhaps the only totally positive comment was:

“In Bulgaria the teachers are always respected and evaluated by the society”.

The most telling comment however was:

“The last step of the society – after the teachers only follows cemetery and prison”.

On several occasions, in conversations with both teachers and directors, the author was told a story which illustrated how teachers used to be viewed by Bulgarian society. It concerned the three most respected people in any village or town: the priest; the policeman; and, the teacher...

The most profound comment for the author however, in relation to the last question was:

“It's needful to consider them like spiritual treasure”

14% of respondents were not prepared to share their views on this item. One can only guess at their feelings but these responses do not reflect a teaching force eager to change. Although the author did not pre-judge the kind of responses that these last two items might reveal, it seemed sensible to follow this line of questioning by asking: ‘what single thing could most improve your job satisfaction as a teacher’? In fact many respondents identified more than one thing from the given list. With only 4% saying ‘it could not be better than it is’ (all at one school in fact...), the overwhelming response, 87%, said ‘more pay’. One should not, however, think that money is the only important issue here. Other significant responses included: ‘more staff development’ with a 47% response; ‘more free time for research / prep’ with a 25% response; and ‘less students’ with a 24% response.

By any standard, the take home pay of Bulgarian teachers is poor. Equal opportunities notwithstanding, this is the reason why women make up around 90% of the teaching population. Men, traditionally the breadwinners in Bulgarian society, need to take jobs that generate more pay. Speaking to some 'ex-teachers' who had left the system, they said they now earned over three times their previous teaching salary working in private commerce. Although statistically only accounting for a low 'impact' on successful implementation of the new approaches, teachers leaving the system for more pay has the potential to create big problems.

The penultimate question on the questionnaire went straight to the point: 'do you think that there are any cultural differences between either teachers or students in Bulgaria and those in Western Europe that might affect implementation of new teaching and learning strategies such as student-centred learning in Bulgaria'? 28% said 'no' and 24% said 'yes'. However a high 'nil' response of 41% means that on their own, it is difficult to interpret these figures accurately. These figures now need to be considered alongside some of the other information to get a bigger contextual picture.

Key findings from the teacher questionnaire survey

- *Most teachers were well established within the teaching system long before the project began*
- *Few teachers have industrial or commercial experience*
- *Apart from the 'pedagogic' component within their own specialist qualification, few teachers have undergone any substantial course of teacher training*
- *There has been little formal staff development since the end of the UVET project*
- *There have been some changes in teaching approach since the end of the project*
- *Very small numbers of teachers have attended the UVET seminars on 'new strategies'*
- *Good understanding of the concept of student-centred learning*

- *Most teachers prefer to use student-centred methods*
- *Teachers recognise a range of the benefits of student-centred learning for their students*
- *Lack of motivation by both some teachers and students the only significant barrier to implementation*
- *Most teachers lack skills to implement effective student-centred learning*
- *Verification process ineffective*
- *Teachers feel undervalued, underpaid resulting in lack of incentive to change*

2. INTERVIEWS WITH TEACHERS

As pointed out in the introduction to the fieldwork, the interview questions were the same as those used for the self-completion survey questionnaire. Where necessary, the selection (multiple-choice) items were used as prompts. Not all questions were used, they merely acted as a guide.

Some of the general questions were useful for gathering quantitative data which may have some bearing on other responses, for example: 'how long have you been teaching?'. Many were not applicable if staff did not attend any of the Phare staff development events. Even with staff that did attend such events, some of the concepts, such as 'student-centred learning' had to be fully explained before they were able to give a reasoned response.

Given the informal and semi-structured nature of the interviews, the author frequently deviated from his set questions in order to pursue other lines of enquiry.

Despite the rich source of information gleaned from such interviews, it became clear that time constraints would mean a reduction in the number of interviews available. Furthermore, just to remind the reader, it was difficult to avoid the situation where the author ended up interviewing teachers who had already been given the questionnaire to complete. For this reason, the author decided to reduce his objectives for the

interviews, and to try and increase the number of questionnaires circulated – but to do this in a wider field by securing access to more schools.

Each interview was scheduled for one hour. Overall, the interviews yielded many interesting and quotable comments. Some interviews however, for example the first one, provided little ‘value-added’ information over and above the minimum responses. This summary will concentrate mainly on highlighting some of the original comments stemming from the informal discussions. They are based on notes made during the interview by the author. The translation format used was simultaneous.

Interview 1

This teacher had not attended any of the staff development seminars. The main changes since the project were in the approach to assessment, different ‘exams’. There were also now more discussions and demonstrations. Students took away information via notes off chalkboard or taking own notes. Although she was able to describe student-centred learning, the example she gave was not illustrative. The main incentive to change was ‘to benefit students’. Benefits for students included: ‘more motivated’, ‘more real learning’, and ‘more emphasis on practical competence’. Benefits for teacher included: ‘more time to prepare’, ‘feel more effective’ and ‘job more enjoyable’. The response to the question ‘what best reflects scl in the school?’ was: ‘students having more responsibility’, ‘active student learning’ and ‘assessment based on performance’. The most difficult to implement was ‘students having more responsibility’ and interestingly ‘pace of learning set by teacher’, which is a characteristic of the traditional approach. Most of the responses above resulted from the interviewer’s list of prompts. Whilst this interviewee was able to identify some of the characteristics and changes associated with the introduction of competency based modular training, her understanding was rather limited.

She identified that the main impact of competency-based modular training was ‘more work generally’, ‘more assessment’, ‘require more skills updating’, ‘more motivated’ and ‘more checking on me’.

Given a choice this teacher would rather revert back to the traditional training because students knew exactly when and how they were to be examined. Under competency-based training there is more work, more assessment. This does illustrate that different methods of assessment have been introduced, although, as the survey found, a verification regime has not been fully implemented.

She thought Bulgarian society thinks teachers are generally 'very important to future development of society'. The main things to improve the job were 'more pay', 'more recognition' and 'less students'. Whilst she thought teachers in the UK were better paid, better valued and more adaptable to change, she thought that there were no cultural differences.

Interview 2

This teacher had attended seminars on modular development and assessment. She said there had been no major change in teaching approach since the Phare project. When asked what she understood by the term 'teacher-centred', she said: "*teaching theoretically without observing whether they are learning*". For 'student-centred' she said: "*Teacher must pay attention to student.. better for this...no barriers...sometimes I tell them that they can teach too*". She preferred the student-centred approach adding: "*I'm not as important as the student*".

When asked how student-centred learning is benefiting her students, in relation to groupwork she said: "*Weak and strong students can be combined...when working on packages, weaker students get better marks.*" It benefits the teacher by making her feel more effective and: "*...pleasure of teaching...feels more useful. I feel happy when students teach me something.*" She said it (competency-based modular training) had been well implemented in the school and she would like to continue with it (...except for assessment...). Teacher's salaries was an issue, although better recognition was seen as more important.

It came through during this interview that this teacher was knowledgeable, motivated and enthusiastic about the new approaches generally, but had some reservations about the new assessment regime.

Interview 3

In response to the impact of competency-based modular training and student-centred learning, this interviewee said: “ *Each new thing is better than the old thing.*” The main problem of the new approach is “ *...the lack of text books. Books are not published on time, there is a problem of accessing literature.*” In terms of perceived differences she said: “ *Bulgarian children develop very well – according to statistics they are ‘very well presented’. Not all parents have the money for equipment.*” A clear acknowledgement of the economic situation in Bulgaria but also a recognition of the capabilities of Bulgarian children. It was very clear that although she said that: “ *... the majority of teachers would be happy to give students responsibility...*”, in Bulgaria: “ *...The teacher is still central to the role.*” Whilst she stated that relationships between student and teacher are now no different here than in UK, she did say that it: “ *...depends on the personality of the teacher.*” She went on to acknowledge that although things were now more informal in schools here, she thought that: “ *...student - teacher relationships more friendly in Western classes.*”

It came through clearly here the still central and dominating role of the teacher. To the extent that it is a very formal experience for students.

Interview 4

This interviewee was the ‘co-ordinator’ for the modular pathway in the school, so the questions pursued issues related to this area. Although it was previously thought by the author that each pilot school had a ‘teacher trainer’, in fact this role is more concerned with passing on general information about the modules and the ‘organisation’ of the training. Her role also includes that of ‘internal verifier’. This includes checking on materials, student’s work and teachers marks, pretty much what an internal verifier does in the UK. Most of the assessment is based on: “ *... a 100*

point system which is then transformed to the 6-point scale.” There does not appear to be any external verifier however. Staff do get the opportunity to go to staff development events, for those who do, they do so on average every two years. Only 50% attend however: “...others not enthusiastic.” She says that the competency-based modular training has been well implemented although teachers have more work. She did say that they: “...need more solid base...library.” There are no cultural issues affecting implementation.

The ‘6-point’ scale referred to above is something that the author spent much time discussing both during this interview but also during previous visits. It is a means of discriminating between the performances of students. It is a rather subjective and, as the author established during previous assessment seminars, a highly unreliable way of grading students. It is also quite out of keeping with a system based on the acquisition of competency. However, this system is used as a basis for giving prizes to students, in the form of books etc. for good performance. Whilst it is quite right for Bulgarians to retain what they see as an important and traditional part of their system, whatever the faults, maybe they could be adapted to complement new approaches. The retention of this approach will be considered later, when discussing cultural differences, as will the competitive climate in the schools to which it infers (see Chapters Seven and Eight and the footnote on page 204).

Interview 5

Once again, the author focuses here on issues raised that add significantly to the weight of evidence. This particular interviewee was quite outspoken. On the Phare project / modules: “*The Ministry need to continue to work on this project.*” On resources: “...impossible to (provide) all groups in a particular module using particular equipment.” On learning packages: “...it is not a real module without the packages.”

The author saw some learning packages that were in the final stages of production, produced by teachers, but there was a problem in getting them published because apparently the Ministry claims copyright. It is also: “...an unpaid task to produce a

book.” At least one had been produced, not published but photocopied and used by students.

On teacher motivation: “ *the (teacher’s) salary is equal to the social aid for the unemployed...it is more difficult to work...teachers are not motivated.*”

On students: “*...difficult for young people to find work in industry...about 20,000 young people go abroad...*”

On work experience: “*...no ‘signed collaboration’ agreements with industry...students visit industry but no work experience.*”

It was as a result of this particular interview, that it became clear that few of the students following the vocational courses actually ended up working in the particular specialism. This will be discussed later. Apart from this, some pointed comments here about the expectations of teachers, the lack of resources and their low pay.

Interview 6

This interviewee first of all gave the author a brief account of the main vocation (modular) at the school and the industry itself. The particular industry in question is a new and growing industry in Bulgaria. There are seven schools in the whole of the country. Three of them, including this one, have just completed the second year on the modular programme, the four others have just started their first year. This network of schools will satisfy the needs of the industry. All documentation related to the courses has been developed by teams of teachers from these seven schools.

Asked about job opportunities for students, the response was: “*I hope our students will be able to find opportunities.*” In the past when handing out Diplomas at the school he felt sad because: “*...he knew that they had little prospect of a job.*” He went on to say: “*...some colleagues don’t care about students compared to other things.*”

On job satisfaction: *"We are satisfied...but the system is too bureaucratic...(we need)...easier published packages."* He did not feel there was enough support from the Ministry, only support at school level. The main satisfaction comes from: *"Personal satisfaction for students...there is no promotion...no jobs outside of school for teachers."* This was an interesting comment and one that seems to contradict what other teachers say, as we shall see later. This may of course relate to the different occupational opportunities outside teaching. On student-centred approaches, he said: *"...documentation to regulate student-centred learning and modular training is not laid down."* *"...some better methods...different atmosphere, better relationship between teacher and student. (there is) equal distribution of responsibility for results."* This acknowledges the more 'informal' approach that may be associated with 'scl' but suggests teachers may not actually be being directed/encouraged to use them.

Furthering this line of questioning, the author asked about whether student-centred learning would be extended throughout the school: *"...we need trained teachers, material conditions and modern equipment...it must be the will and desire of teachers."* There would be resistance from teachers: *"...because of more work...not paid...needs state support."*

Asked whether the introduction of competency-based modular teaching has been successful: *" Too early to say whether system is working...need to compare."* He went on to say that the evidence of success will be: *"Student graduates from school goes to a firm – confirms competencies."* It was clear that some confusion was being created by running two systems: *" It is not very good – the fact that you combine traditional teaching with modular from an early age. History, geography and modules go together."* This provided confirmation that the modular approach was restricted to specific courses, even within the same vocation, and that they were seen as quite separate to every other course in the school. Furthermore, there was only an expectancy to adopt student-centred learning approaches for the vocational subject content of the course, not other subjects followed as part of the course.

On possible cultural / contextual differences affecting implementation: "...*Internet means no room for teacher...*" He did think that there were differences in parent's attitudes: "*There is a difference in national traditions. When students do something wrong (in UK), parents are informed to do something about it. Their attitude to the law is different. Here in Bulgaria, we cannot find that.*" He went on: "*It doesn't matter where you were educated as long as you can work anywhere.*" This highlights the fact that in Bulgaria, vocational subjects commence during the compulsory schooling years, from fourteen upwards. Often, perhaps more often than not...the vocation and/or the school, may actually be chosen by the parents. This would account for the lack of continuation in the chosen vocation.

Commenting on the (re) emergence of the concept of 'lifelong learning', he said: you are "*...upgrading all your life.*"

Interview 7

This teacher, in common with others spoken to at this school, also had another job, 'making samples / models' (This contrasts with teachers spoken to at most other schools). This refers to making up clothes samples for clients. She was also a young and recent member of staff and: "*...came in during the project and never used old methods...*" She had attended the 'new teaching strategies' seminar at Bankya. Interestingly, some other responses appeared to contradict this. For example when asked have you changed your teaching method as a result of attending any of the Phare seminars, she said 'yes'. With further prompting she said that before the project, 'lecture' and 'demonstration' were the main methods used, after these were also supplemented by more discussions and groupwork. It seems likely that rather than a contradiction, she was merely stating what was the norm in the school, and her recollections on how she was taught. The only barrier to successful implementation was said to be lack of resources. When asked what could improve job satisfaction, she said: "*...success of students.*" The most memorable thing she learned during the seminars was that: "*...(the) student must be in the centre, not the teacher.*"

Interview 8

The second teacher interviewed was very clear in her mind about what characterised student-centred learning in her school – ‘students have more responsibility’: “...*not just to tell students but to show them...groupwork.*” When asked for an example she said that she gave them homework: “...*to construct models to do themselves...the students like this...to have more responsibility.*” When asked which aspects of competency-based modular teaching / student-centred learning were the most difficult to implement she said that: “...*more time was required.*” Also, there were: “...*not many resources.*” Interestingly, the author was told by a reliable source, that this school was one of the better-equipped schools as a result of the project. Despite the additional work she considered she was actually more motivated. In keeping with almost everyone interviewed she considered more recognition would improve her job satisfaction, specifically, she identified: “...*by students and parents.*”

Interview 9

This interview was not actually carried out at a school, but in Pleven, a large city mid-way between Sofia and Russe. This interviewee used to work at one of the pilot school but left around the end of the project. The author thought it important to get her views, given that she was one of several young people who were highly motivated by the introduction of the new approaches and appeared keen to move things forward at the school. It was very sad, therefore to learn that she had left. This interview was carried out in a mixture of French and Bulgarian...(the author frequently conversed in French with a number of Bulgarians), but when this let him down, he reverted to the skills of his translator.

She attended seminars at Varna and Bankya, covering the key ‘new’ methodologies associated with teaching strategies and assessment. During the seminar on ‘new’ teaching strategies, during one of the groupwork exercises the group she was a member of produced an excellent sample learning package, which showed great invention and promise. When asked whether she had managed to develop any such things at the school she replied no, citing ‘lack of resources’ and ‘there is no

incentive' as the reasons. Not for the first time did this seem to contradict general impressions. As pointed out in the interview above, the author had it on good authority that this school was one of the best equipped of the pilot schools. When asked to expand on this, in terms of actual barriers to successful implementation, 'lack of time', 'teachers leaving the system' and 'lack of staff development' were all identified. The second of these clearly refers to the fact that another member of staff from this school, also one of the 'modular team' who attended the seminars, had also left the school.

She left teaching because she: *"...felt she was learning nothing new...no incentive to develop."* In addition to this she left for a job which now earns her: *"...three times my teachers salary."* This increase in salary is also one of the reasons the other teacher referred to above, left the school. Although clearly a key factor, it was not the only factor. She thought that 'teaching generally is not valued as much as other professions' and that in terms of job satisfaction 'more recognition / better valued' was cited as important. In terms of the school and the project generally, she said that the: *"...impetus to change slowed down from the end of the project."* In her new job, she now: *"...has a lot of responsibility...for quality."* At the school, she claims: *"Students not encouraged to strive for quality products."* This is despite there being a section dealing with 'quality' of products produced at the school. There appears to be a difference between how quality is defined in schools and in industry.

During the interview, the author mentioned that the Director of the school had indicated to him that both her and her colleague, who had also left, are considering a return to the school. This was not the case, although she did say that she: *"...would like to return to teach at some point."*

Key findings from the teacher interviews

- *More work / assessment under competency model*
- *Lack of up to date resources (books and learning-packages) affecting implementation of student-centred learning*
- *Teaching / learning environment is formal*

- *Few staff take up opportunity of going on staff development courses*
- *6-point scale of grading still used even on modular courses*
- *Low pay, status and lack of recognition affects motivation*
- *Student-centred methods only used on modules*
- *Career opportunities in respective skills areas poor for trainees*
- *Limited support from Ministry for modular programme*

3. SCHOOL DIRECTOR QUESTIONNAIRE SURVEY FINDINGS

As with the teacher questionnaire findings, this section is an abridged version.

The actual raw results for the questionnaire responses and the detailed analysis and interpretation can be found in appendix 8. This analysis will concentrate on selected significant patterns across the director's responses. Seven (50%) respondents agreed to be quoted anonymously, three (21%) disagreed, and 4 (29%) did not indicate.

Fourteen responses were received. There is no way of knowing what percentage of these had already been interviewed by the author, if any. If one assumes that seven of the questionnaires received were from the seven directors already interviewed, that still leaves a figure of fourteen out of fifty, or 28%, of directors of pilot schools who have volunteered data for this research. The figure is more likely to be 30% plus, given the likelihood that not all directors interviewed would have completed the questionnaire, knowing they have already provided the information to the author.

Of the fourteen directors who responded, over half of them had been in post 'over nine years' Some actually stated how many years 'over nine' they had been in post. Only three had been in post for less than two years. The only thing to note here is the author's 'suspicion' that long-serving directors are more likely to be 'traditionalists' and not as convinced as the need for change as their younger counterparts. In fact as far as the responses were concerned no such pattern emerged.

In relation to teaching qualifications, responses do indicate a population of teacher-trained staff, although the nature of the qualifications remains unclear. Again, the responses to how many staff attended Phare staff development seminars is difficult to

gauge. What is clear is that staff from most of the schools did send staff along to the seminars. Interestingly, thirteen of the fourteen directors (93%) indicated that general feedback from the seminars was either positive or very positive. This brings to mind the unsolicited comment given to the author by a school director in 1999 (see Chapter Three, p62). See also Smith in Muckle and Morgan (2000 p 86).

100% of the directors said there was a designated teacher-trainer in the school although not all did this as a full-time role. Staff development activities were cited as 'frequent' by 71% of respondents, although few further details were given. This contrasts somewhat from the teacher's responses to the same question.

Echoing the teacher's responses, most directors identified that there had been a significant move away from 'lecture' as the main teaching method since the project. Equally, a significant rise in the use of 'groupwork' was identified as a result of the seminars. Responses to how students took information away from sessions also indicated significant changes. For example before the Phare seminars, nine directors identified 'copying off the chalkboard' as the main method, but only one said this was still the case. Again, whilst eight said 'dictation' was also common before, only one said it was still so. There was virtually no difference however between the 'before' and 'after' responses to students making their own notes as they went along. There was said to be an increase in the use of learning packages since the seminars by ten directors. All respondents stated that their staff had changed their teaching methods significantly as a result of attending the Phare seminars, eight of these referred directly to the 'new methods' and 'assessment' seminars. There was no significant pattern in what the main changes were although 'team teaching', 'active learning' and use of 'learning packages' did feature.

It was clear from the responses that a combination of the Ministry and / or Ministry 'expert' continue to have a big responsibility in how things are taught in the schools. Eleven directors identified the MES as being responsible for how subjects are taught in the schools.

Ten directors stated that 'student centred' was the main approach in their schools. However only six actually gave examples of such methods. In recognising that not all staff are using student-centred learning approaches, half of respondents said that a 'lack of will'(motivation)' was the reason. Only four identified a 'lack of resources' as being a significant factor in why such approaches were not being used.

Nine directors stated that the main incentive for teachers to change their approach was to benefit students. The biggest response to how student-centred learning was reflected in their schools was 'learning not always school-based'. The more obvious characteristics featured rather less but students having 'more responsibility'; 'more active students'; and 'assessment based on performance' all featured. Some responses indicated either possible gaps in understanding of the concept of student-centred learning or mis-translations. For example some directors identified 'passive students' as exemplifying student-centred learning in their schools. This option was included as one of several 'distractors' to check full understanding of the concept of student-centred learning.

Although the majority of directors, said their staff had been sufficiently trained, some also recognised the fact that there had been insufficient training in the 'new' techniques. Despite some indication that not all directors were fully conversant with student-centred learning, most were able to identify the key benefits to students.

When asked how 'scl' learning benefited their teachers, most said it made teachers feel 'more effective' and half said the job was 'more enjoyable'. Directors did identify however the impact that the reforms in general had on their teachers: 'More assessment; 'more work generally; and, the need for 'more skills updating' were the main concerns. Directors were, however, overwhelmingly in favour of continuing with the new approaches. All directors stated they wanted to continue with them.

The main barriers to implementation were seen as: 'lack of resources'; 'unsuitable curriculum'; and, 'lack of staff development'. 'Unsuitable students' and 'teachers leaving' also accounted for a few responses. Most Directors did recognise that their teaching staff were generally 'not as valued as other professions' by Bulgarian

society. Interestingly, no additional comments were given here to elaborate, although further responses to other questions did underline these feelings.

Despite the above responses, only eleven staff over all the fourteen respondents schools were identified as having left the profession. This is in sharp contrast to what one director told the author during an interview when she said that there was an approximate turnover of staff of 20% per year. This cannot be confirmed however. The main reason for leaving, according to respondents was for 'more money elsewhere'.

When asked what single thing would most improve the job satisfaction of vocational teachers (most identified more than one thing!) 'more pay' only accounted for half of responses, as did 'more recognition'. 'More staff development' accounted for a significant number of responses. Surprisingly perhaps a few directors said the job 'could not be better than it is'...

Asked to comment about cultural differences that may impact on the reforms most said there was no difference with only two directors identifying a specific difference (lack of motivation of Bulgarian teachers / students).

Key findings from the Director questionnaire survey

- *Most directors were well established within the teaching system long before the project began*
- *Designated 'teacher-trainer' role in schools ambiguous*
- *Changes in teaching methodology have taken place as a result of UVET project*
- *Ministry have significant influence in how subjects are taught in schools*
- *Lack of staff motivation and lack of resources the main barriers to implementation*
- *Most directors thought staff sufficiently trained for new programmes*
- *Job satisfaction of teachers will improve with more recognition and more pay*
- *No significant cultural differences affecting implementation*

4. INTERVIEWS WITH SCHOOL DIRECTORS

As with the previous set of interviews with the teachers, these interviews were scheduled as semi-structured in order to provide more flexibility in approach. The author had devised a similar interview checklist, complete with prompts in the form of multiple choice of selections to aid coding and 'cluster' formation for analysis purposes. This was also done in order for it to be used as a self-completion questionnaire, should the need / opportunity arise. It has already been stated that as a result of discussions with the Head of VET at the Ministry, she not only gave permission to distribute the questionnaire to all the Directors of the Pilot Schools, but also insisted on letting her office distribute, collect and forward them on to the author in the UK. In fact at the time of writing fourteen have so far been received, the results of that survey are given in the previous section.

Interview 1

The Director had only been in post for three months. There are approximately eighty staff in the school, most of them female and also full-time. Their main technical qualifications contain a teacher-training element, which is the minimum requirement for teachers. The designated 'teacher trainer' in the school is more a combination of 'modular approach' coordinator and internal verifier who briefs module teachers at the beginning of term and ensures teachers are fully conversant with requirements for modules. She stated that up to fifteen staff went on Phare staff development seminars, three quarters of them on the 'new teaching and learning strategies' seminars. The general feedback response was positive. Specific staff development events in the school were infrequent and focused mainly on ensuring training schedules were up to date and that assessment protocols were in place, for example.

Although teaching methods had changed 'significantly' in the school (the methods employed consisted of 'lecture', 'demonstration', 'question and answer', and 'groupwork') it was difficult to identify exactly how, since most of these methods were said to have been in use before. In fact during observations, most teachers gave information using the chalkboard with students copying. She said the main change is

in the assessment methods used, which are now closer to the competency-based teaching approach in terms of frequency and use of performance criteria. These still had to be converted to the 'six-point scale' however.

The Director thought the main incentive for teachers to change their teaching approach was 'to benefit students' and that the main characteristics in her school of 'scl' were that the 'students have more responsibility', there was 'more active learning', students were 'assessed on performance and knowledge'. However she said that the 'pace of learning was set by the teacher' which in theory at least is contrary to 'scl'. The most difficult aspects of 'scl' to implement in the school were increasing 'groupwork' and 'letting students learn at their own pace' – lack of finance to employ more teachers was stated as a reason for this. Another apparent contradiction was that 'more teaching – less learning' was also cited as difficult although this may have been a misunderstanding.

The main benefits for students were cited as 'more emphasis on practical competencies'; 'they learn them quicker'; 'they become more responsible'; and they 'develop better interactive and personal skills'. For the teacher benefits were restricted to 'feeling more effective in their job' and it 'being more enjoyable'. The key impact of change on teachers overall was the 'increase in work generally', particularly in the area of assessment. There was also 'more checking of their work'.

In terms of the future, the Director thought that a combination of traditional and modular methods would be most useful. She also thought that the students only learned from test to test. A lack of resources and teacher reluctance to change were the main barriers to implementation cited. She also thought that vocational teachers were not really valued as much as academic teachers but that they were respected and valued by society. Although few staff had left her school, when they did it was usually to find better paid work elsewhere. Better pay and holidays (they currently have forty-eight days) were also cited as factors in improving satisfaction of teachers, for herself she would value more recognition of the job she was doing.

The only comment regarding possible cultural differences between teachers and students in BG and the EU were: “...*Bulgarian people are sensitive to the education of their children and teachers and teaching is very conservative and change would take many years...*”

It also became clear, and supports other findings, that there are effectively ‘two pathways’ operating in the school: the traditional pathway and the ‘new’ modular pathway. Where teachers teach on both pathways, they will use whatever teaching method they wish but are more likely to use student-centred methods when teaching the modules. There appears to be no systematic means of ensuring teachers not involved in modular delivery acquire the skills to develop student-centred methods.

Interview 2

The Acting Director was interviewed because the Director was out of the country. Again, she was a delegate on one of the author’s previous seminars. She has thirty years teaching experience at the school. There are 1300 students at the school and 115 teachers (70/80% female). She confirmed that most teachers gain their teaching skills through the pedagogy component of their technical subject studies. The question about a ‘designated teacher trainer’ in the school initially draws comments about the school counsellor. It is clear that there is no such role, only subject / module leaders who are responsible for ensuring staff teaching on these modules are following the scheme and assessing according to schedule, they are effectively the internal verifiers. The distinction between those who teach on the modules and those who do not was raised again here. There are thirteen people in this particular vocational trade section who ‘teach in the traditional way’, which actually means they do not teach on the modules rather than anything to do with methodology although there appears to be a suggestion that only module teachers need to use the student-centred methods. This was confirmed by the response to whether staff have changed their methods significantly as a result of the Phare project “...*only for the modules*”. There was little evidence of crossover of ideas to non-module teachers, in fact ‘non-module’ staff do not want to be involved because of the additional work entailed. Staff development is only put on at the school when “...*it is necessary*”, suggesting that it is infrequent,

otherwise staff go to the 'Information and Upgrading of Teacher Qualifications' Dept. at Sofia University for any development needs.

A range of teaching methods were used in the school covering both teacher and student-centred approaches, interestingly most permanent records were via note taking off the chalkboard or overhead projector, "*...they understand better than using handouts*". There is evidence that student-centred learning packages are in use but there is difficulty in getting them published due to the fact that the Ministry wants to claim copyright on the work. The Acting Director herself had produced such things but they expect students to photocopy them themselves from the library. The author saw other examples of packages, which were in the final stages of completion ready for use.

A clearer interpretation of 'scl' was given, distinguishing between 'giving information out' and 'more active discussions'...the main approach used in the school is student-centred but only in the modules. One of the key differences was that the practical work previously did not relate to the theory, that was scheduled for long after / before the practical, now the theoretical part is done first before being exposed to the practical. "*...immediately we can establish what students have learned so the student knows..*"

The main barrier to implementation is that "*...there is a lot of labour, a lot of work. Not all of them will like to work for just glory*".

She said that there are no cultural differences affecting implementation. "*Conditions are different but you cannot compare.*" Teachers broadly satisfied, "*...but would like easier method of getting packages published and a less bureaucratic system.*" Not much turnover of staff because "*...there are no jobs outside of school for teachers...*" As far as students are concerned, the choice of vocation is largely that of the parents, given the early starting age (fourteen). They go to what parents consider to be a 'nice' vocational school, there is little student motivation and this is reflected in the results gained.

In summary, the Assistant Director here showed a clear understanding of the importance of using learning packages as part of the wider application of 'scl' but contrasting somewhat with the view about use of chalkboard. Comments about linking practical to theory also showed a good understanding of effective integration. She provided further confirmation about the 'separate pathways' between traditional and module teaching. She gave an interesting comment regarding the lack of job opportunities for teachers outside school, which contrasts somewhat with the views of some teachers. As previously mentioned though, this may have more to do with the specialisms themselves.

Interview 3

The Director has been in post for less than two years and was again an 'ex-delegate' from the Phare seminars. There are 500 students at the school and forty-four teachers (forty female). She teaches about four hours per week. Most students go on to HE (app 80%), because there is little prospect of gaining employment in the industry. This often results in many changing direction from the vocation they came in with. Many students at the school are children of previous students. Backing up what the previous Director (Assistant) said, this Director stated, "*When students start at fourteen they don't know what to do so parents decide*".

It was stated that it was impossible to be a teacher without a teaching qualification. In response to questions about how many staff had attended the Phare staff development events only three at the beginning but this built up to fifteen towards the end, largely as a result of pressure from the Director, these were mainly for the module development however. As with other schools, there is a module leader who coordinates method of delivery and assessment of modules and provides general support. No formal in-house staff development to disseminate good practice but every year four staff will be on staff development events at Sofia University.

The main teaching methods employed are 'groupwork', 'student tasks' and 'problem solving', whereas traditionally there would be mainly 'chalkboard work' plus 'workshop practicals'. There has been a significant change since the Phare seminars,

but the decisions on how to teach rest with the teachers themselves so if they are motivated to do so they will, if not, they won't. There is no incentive to do so, it is only for the benefit of the students. There is more work for staff so some resistance to new approaches. The Director quoted one staff member as saying: "*...it is a foolish thing, we will finish with this in a year, many schools dislike it. I don't want to have modules*". Students are given more responsibility but they are not generally happy with that. Students are assessed on performance, lots of group and team work and individuals learning at their own pace were all identified as reflecting scl at the school. The most difficult things to implement were 'students learning at their own pace', 'having more responsibility' and 'active student learning'. Mainly because they were not used to it and they preferred to be told because this is what they were used to and the way they were brought up to think at elementary school. Motivation was also linked to the lack of realistic job prospects. However, the approaches were seen by her as benefiting students in terms of their exposure to more practical competencies.

Main benefits for teachers were that they felt 'more effective' and it gave them 'more time to prepare'. On the negative side, the biggest impact felt was the 'more work involved'. One point, which contradicts previous interviewees, was that she said there was less assessment. No major barriers stated but a reluctance to change ways of thinking and a lack of understanding were seen as factors. Teachers do feel undervalued by society but society values the schools themselves. Teachers are concerned at the lack of responsibility shown by parents towards their children's education, expecting it to be solely the responsibility of the teacher.

In terms of job satisfaction, more links with industry was seen as important. No cultural differences affecting implementation, were identified, "*...it depends on the person him/herself...*" The most memorable thing about the seminars was seen as the ways of presenting things (graphics, activities etc.)

This interview provided further evidence of another emerging issue, the role of the parent in choosing the school. This reflects the compulsory schooling dimension to these vocational secondary schools. Of more importance however, linked to this, is the emerging fact that many (most?) students go on to higher education (HE) upon

completion of the course. Other key points raised related to lack of motivation on the part of students, due to previous schooling, and also lack of will of some teachers to change.

Interview 4

The Director has been in post for four years. There are 700 students at the school, approx. 90% female, and fifty-five teachers, approx. 90% female. As in the other school, the 'modular course' exists alongside a more traditional route although the end qualification is the same. Even on the modular course, the general education subjects are taught mainly using 'traditional' methods, ie. chalk and talk and lectures. Only a third of staff have additional teaching qualifications to the pedagogy training received on their technical qualification courses. This is largely due to the fact that staff have to pay for their own additional staff development. A point, which has been raised before.

About half of the staff teach on the module programme but more would like to. This contrasts with the view of the Director at one of the previous schools. There are a smaller number of teachers who form the core 'cadre' and it was mainly these who went on the Phare staff development seminars, about fifteen in number. The feedback from these events was very positive but two teachers have since left, with low pay being cited as the main reason. For example one now earns three times her previous salary in the clothing industry. In a previous interview it had been stated that there were no jobs outside of school for teachers, clearly this is not true in all cases. Some of the teachers on the 'traditional' course do teach on the modules however. The 'module' team did do some in-house staff development to share the new teaching methodologies. One of the team has a special role as the module course coordinator and has a reduced teaching load to allow for this. This is common practice with all pilot schools. It was stated that staff development takes place frequently, which contrasts with the generally emerging picture overall.

Typical teaching methods currently employed consist of 'lecture', 'discussion', 'presentations', 'demonstrations' and 'problem solving', whereas previously and

under the traditional pathway 'lectures' and 'chalk and talk' were / are the norm but it depends on the topic. 'Individual research work' is used very little. 'Dictation' and 'chalkboard notes' are favoured for giving students hard information with 'handouts' being used sometimes. Staff have changed approach as a result of the seminars but this is mainly in relation to the modular course, "*...the philosophy is very different for modules*". Asked to expand on this, she simply referred to the modular project as a whole and how staff had been exposed and inducted into the effectiveness of 'scl'.

Interestingly, one of the main changes was a move away from five hours practical followed by five hours theory under the traditional approach to a system based on "*...theory all January followed by practical all February*". It is claimed there is a better linking of practical to theory in this way, by the time the practical work is undertaken they will be able to relate the theory. In response to the main approach in the school, teacher centred was cited as being dominant in the first instance followed by a gradual move towards student centred, which has a certain logic.

Even when benefiting students and industry are seen as main incentives to change teaching approach, it is the Ministry who dictates that they must change. Active student learning, more student responsibility and lots of groupwork are characteristics of student-centred learning at the school but more student responsibility is seen as the most difficult to achieve: "*...it is easier to just go in and teach 'normally' both for teacher and student and less work for both.*" The Director gave no definite view on whether staff are sufficiently trained in new methods – 'yes and no'. She thought that 'scl' benefits students by 'motivating them more', and that 'more real learning' takes place and they 'develop better interactive and personal skills'. In terms of benefits to teachers, she said 'feeling more effective' and making the job *definitely* 'more enjoyable' were cited. She identified the following as having the biggest impact on teachers: 'additional work', 'more skills updating required' but also that they are now 'more motivated staff'. In spite of the additional work the modular approach and the associated 'scl' bring, it is preferred over the traditional approach. The main barriers identified were 'lack of resources'.

According to this director, whilst vocational teachers are seen by Bulgarian society as important to the development of the country, it is generally valued less than other professions. In terms of motivation, teachers 'feel undervalued'. The two teachers who left the profession did so to seek more money in industry, whether being undervalued had anything to do with it is open to question. It was suggested that the two who left would actually like to return, when asked why, the response was, "*...it is not just about the money...once you become a teacher you think in a certain way..*". She said that the main things to improve job satisfaction would be to have more recognition and to be more valued, also the availability of more staff development. When asked to project about difference between the UK and BG, it was suggested teachers in the UK might be 'more valued' and have 'better pay' with 'more resources' available to them.

In terms of cultural differences, it was stated that: "*Teachers in Bulgaria are given special respect whereas in Western Europe there is more equality between teacher and student. This needs changing, it is not the job of the teacher to give rules on moral standards*".

This interview provided further confirmation about issues related to the separate pathways and teachers paying for their own staff development, although there is 'frequent' in-house staff development. Some apparently inconsistent views about the teaching and learning methods used in the school were evident. The Director provided confirmation about the teachers who had left the system and provided an interesting quote as to why she thinks they will return. Although she said it was not just about the money, all respondents from this school put this as top of the list of things that would make their job better. She provided sound views about linking theory to practice but implementation at this school does not appear to allow for effective integration because of delivery being in blocks. The final quote about student – teacher relationships shows a clear distinction between the roles of teachers in vocational education in Bulgaria and the equivalent in the UK.

Interview 5

(Assistant Director) This was only the school's third year on the module programme. The Ass. Director has been in post for over nine years. The school has 760 students and forty staff ('mostly women'). All staff have pedagogical skills which were learned as part of the courses leading to their professional qualifications. Approximately twelve have got additional teaching qualifications but the cost either to the school or the individual have prevented any widespread further staff development. Some local staff development is available locally and informally with colleagues from other schools. Only two teachers have had any staff development associated with the Phare programme, they went to the UK as part of their specialist training. The same two attended events organised by the Ministry in Sofia on modular approaches and 'trained' the other three in the five-person team involved in the modular programme. Teachers do exchange information with colleagues involved in modular delivery at other pilot schools however. This school is close to one of the other pilot schools and does appear to have some links. In fact the author's visit here was arranged through the aforementioned school's director. It would seem probable that this is the main source of the exchange. It appears that some of the methodology was 'presented' to teachers on the traditional courses, some of whom do try to implement them.

The main approaches in the school include 'lectures', 'discussions', 'groupwork' and "*...making tests...All methods cannot be used in all subjects, students do like these methods.*" She went on to describe the class being divided into two to undertake some groupwork, there is some suggestion that because of size of groups (twenty-six), it is difficult to initiate groupwork. The main method of taking notes is by dictation, students taking their own notes and using resource books.

It is too soon to say whether there has been a significant change in methods since becoming part of Phare programme. Some integrated sessions are said to take place where, for example, English teachers get together with technical teachers to co-ordinate subjects / lessons.

The author was told that one teacher has a 'methodist' role to help colleagues in 'making packages'. When this was pursued, it became clear that this role was in fact that of internal verifier, and that he/she doesn't actually have any teacher-training role at all. The Assistant Director herself is responsible for directing teaching methods at the school, and in turn, such direction emanates from the Ministry. It was also acknowledged by the Assistant Director, that staff have been insufficiently trained in the new teaching methods. This reflects the fact that the school joined the pilot after the project finished. Furthermore, it is an indication of the lack of effective dissemination and cascading of ideas and approaches through staff development.

She was unclear about the term student-centred learning until it was explained, but it was clear that 'teacher-centred' was the main approach used in the school. A 'Lack of resources' and in some cases a 'lack of will' were cited as reasons / barriers to implementation but the benefit to students was clear – she indicated that 'they are more motivated', there is 'more real learning' and they become 'more responsible'. She said that many students would like to come to this school, claiming that it had a good reputation and achieved good examination results. Students undertook some work experience, but it is limited to the final two years of their courses and only lasts for two and three weeks respectively because of the limited industrial contacts the school has. In terms of how scl benefits teachers, 'more time to prepare' and feeling 'more effective' were cited, but it was stated categorically that they *did not* 'make the job more enjoyable'. The main impacts of scl/modularisation in the school had been 'more work generally' but teachers were generally 'more motivated' – even if it was only because it (scl) is something new.

There was definite hesitation when the author asked whether there was any desire to go back to the traditional approaches or continue to develop the new methods, but she did acknowledge that teachers must change their methods despite barriers such as 'lack of resources', 'staff development' and a certain 'reluctance to change'. Teaching was said to be 'not generally valued as other professions'. She acknowledged the many additional hours needed to prepare etc. 'More pay' was seen as a factor affecting motivation to change but not the most important one. 'To improve the job', 'less students' and to enable 'more effective teaching' were all cited as important

factors in adopting scl but the 'satisfaction of seeing students succeed' was seen as the most important one. Again, this hints at the competitive environment that exists within the school system in Bulgaria. This is discussed in Chapter Seven.

In summary, although this school has not had the same benefits of staff development that other pilot schools have had, they do seem to be trying to 'cascade' some of the methodology, even with their 'non-module' colleagues. Group size was beginning to emerge as an issue related to barriers to implementation. Dictation was also coming through as the main source of providing information to students - a very traditional and teacher-centred' approach. This interview provided the strongest indication yet of the central control exerted by the Ministry in terms of teaching approach. The description of the role of teacher-trainer in the school added to the apparent confusion and ambiguity in this area. Whilst the Assistant Director acknowledged the benefits of student-centred learning, she added an interesting denial that 'enjoyment' of teaching was a benefit.

Interview 6

This was the one and only non-pilot school visited. The Director had been in post less than two years. She had heard about the author from fellow directors. There are 841 students at the school with sixty-one teachers, forty-five of whom are women. Interestingly all the teachers in this particular vocational section are previous students. The main course here is of five/six years duration. Most have the pedagogical skills gained as part of their professional university gained qualifications. A few have additional teaching qualifications from the Department of 'Information and Upgrading of Teacher Qualifications' at Sofia University. Several of the questions re. the project were not applicable, no one had been to any of the seminars, although the Director herself thinks she met the author during one such event. There is no designated teacher trainer in the school and no staff development activity, but the general subject teachers often go to Sofia University for staff seminars. When asked about the vocational teachers, it was claimed that because, there were only a couple of highly specialised teachers in the vocation, they could not cater for them. When it was

pointed out that they could join any kind of group to learn new methodology this was accepted.

It was stated quite clearly that the traditional approach to teaching was used at the school. The main teaching methods used are 'lecture' followed by 'dictation': "*The teacher goes into class, s/he gives a brief review of last weeks lesson, then tests three or four students, then gives a twenty or twenty-five minute lecture on a new topic...about 90% do this, a few do more*". Teachers can teach as they wish in class. Because of the highly specialised nature of this course there are no books available in Bulgarian.

The Director and the Assistant Directors (there were two), were not familiar with the terms teacher-centred and student-centred. When it was explained, they stated categorically that the approach was teacher-centred although problem solving and practical aspects were covered in the laboratories, for example in solving practical problems associated with mending optics, watches etc.

They did not seem to think that implementing 'scl' would be a problem. When asked what the main incentive would be for teachers to change their approaches, she said that 90% of the teachers had a clear understanding that their job is to benefit students. However: "*Motivation is different for each teacher. For example one colleague is using / creating different tasks to help her students, for monetary gain*". Once again, a value comment related to teachers: '*...to be a teacher is a special thing.*'

'Students learning at their own pace' and 'learning not always school-based' were cited as likely to be the main barriers to 'scl', also the ubiquitous 'lack of resources'. Inertia by some teachers was also a factor. The Director pointed out that assessment must be based on both performance and knowledge (the 'optional prompts' had them as separate items).

If student-centred learning was introduced she thought that it could benefit students by 'learning competencies quicker' in a more realistic way. It was also recognised that they would develop 'better personal and interactive skills'. It was accepted that this would be a good thing because they did not do too many things in groups and it would

enable the establishment of better relationships. It could benefit teachers simply by introducing change and 'making the job more enjoyable'. The job could be made easier also, but it would not always be applied.

In general it was thought that Bulgarian society undervalues teachers but many of the negative thoughts were based on "*...if one teacher is seen to be bad then all are thought to be bad*".

Few teachers were leaving the school but there had been a 'pleasing' influx of ten new, young teachers who were keen and enthusiastic. It was stated that pay was not the most important thing although of course it would be a factor in improving job satisfaction. Seeing their students doing well gave a sense of satisfaction to their teachers. The Director thought that there were no cultural differences, either with students or teachers that would prevent the implementation of scl and the modular programme.

This was the clearest description yet of how a typical (traditional...) Bulgarian teaching session takes place. Few real differences were identified between pilot and non-pilot status although there was no teacher-trainer in the school and no staff development took place. Acknowledging that implementing 'scl' would not pose a real problem she did underline the reality of differences in teacher willingness.

Interview 7

The Director had been in post for over nine years. There are 1200 students in the school and 100 staff, 80% of which are female. Interestingly, the Director of this school was male, the only one of the seven interviewed who was. All staff have pedagogical skills which were included as part of their professional examinations. Many have 'first' and 'second' level teaching qualifications in addition to this. Six staff attended Phare staff development events but two of these have now left. Only the vocational subjects in one course (out of forty in the school) are part of the Phare modular pilot. Although the Director said feedback from Phare staff development events was very positive, especially related to the vocational subjects, he was not keen

on this particular modular approach: *"I do not like the modules because the programmes are too easy – these students are very clever, they are special kids"*. In response to a question about who decided on the content, he said a team made up of five from his school and five from a similar specialist Mathematics school in Plovdiv decided but the 'overseas specialist' from Ireland did not want the content to be at a higher level.

Staff development at the school was infrequent, mainly due to the fact that teachers have to pay for themselves. The main teaching approach at the school was traditional with lots of written tests, because of the nature of the main subject matter. Most of information is taken down 'off chalkboard' or from 'dictation'. There has only been a change in approach since the Phare project in one of the main subject areas: 'informatics'. There has been some informal sharing of new ideas from seminars but only informally. It is up to the teachers themselves on how they teach in the classroom. The Director claims it is difficult to use 'scl' because of large classes and their need *"...to know more and more..."* so the role of the teacher is mainly that of information / knowledge giver. However he claims that students are active in the process, if not 100% then 90%. The best students actually take part in the teaching. In fact the author 'almost' witnessed this but for the nervousness of the student upon the author's arrival in the class. *" From my own experience we know that everyone teaches how he can not how he should...it is a very conservative system."* He stated that there has not been enough training on the new methods. Teachers are forced to change however as a result of the students demands, they are thirsty for new knowledge which they expect you to give: *"...when I have to work with very good students, I am exhausted after a few hours"*.

In response to questions about students taking more responsibility, he said that they would love to: *" We had an experiment for three days in which teachers and students changed places, creating a kind of student government / management team. The result was a better organisation of the school...we learned many things"*. He said that the pace of learning is set by the student rather than the teacher which is interesting in this largely traditional school but perhaps the nature of these students and this subject. Not a great deal of groupwork carried out although it is sometimes used especially in

relation to preparing for competitions. He did accept that scl is likely to result in more and quicker real learning, students becoming more responsible and developing better interactive and personal skills. Teachers are also likely to feel more effective but: “*When students are more active, the teacher has to give them more information...*” The impact of ‘scl’ has only been felt in the vocational subjects in terms of ‘more work’ and ‘more assessment’ although some of the other teachers do similar things, even though they are not trained to do so and they do not have to. However, the Ministry are not happy if such things are done on traditional courses. Inertia was cited as a barrier plus ‘lack of resources’ and ‘lack of time’.

The Director thought that teachers were ‘not valued’ generally by Bulgarian society although they were not shown disrespect. He went on to say that it was not an enjoyable job to do when you felt undervalued. He also went on to tell the tale about the three most important people in Bulgarian society...a tale the author heard many times during the fieldwork (see teacher questionnaire findings). Factors such as ‘more recognition’ and ‘more pay’ were identified as making the job better, although the latter was said to be not the most important thing. Interestingly, he considered there was enough time for teachers to carry out research and they had enough holidays already. He identified ‘no differences’ related to cultural factors, the only difference, he said, is language.

In summary, this director gave an unequivocal view on student-centred learning and modularisation in general, and not a very positive one at that. Despite a reluctant acceptance that some aspects of ‘scl’ can benefit students, really, only the traditional approach will do for this school and this subject (maths). The Director was unhappy at the low level of the resultant modules, in fact he had little positive to say about the course and it was clear it had a low priority in the school overall. The author finds further confirmation here of other issues affecting effective implementation, including teachers paying for their own staff development and large class sizes. Again, central Ministry control was identified in relation to the methods used in the school. The author considered the comments about the more activities given to students - the more work there is for the teacher was very illuminating. The Director gave some good examples of student-centred activities but this has nothing to do with the project or

learning approaches in general, just one-off experiments. There is also clearly a very competitive edge to this subject specialism, in preparing for competitions and the Director feels student-centred learning has no role here. The competitive environment that appears to exist in Bulgarian schools was also identified earlier and will be discussed later. Contrary to the views of teachers, this director said they have enough holidays already. Actually, the first director interviewed did say they had forty-eight days which compares very favourably with teachers in Western Europe.

Key findings from the Director interviews

- *A number of new, younger directors now in post*
- *Most directors (and teachers) are female*
- *Role of designated 'teacher-trainer' ambiguous*
- *Directors and teachers acknowledge benefits of student-centred learning*
- *Vocational school system still very conservative*
- *Student-centred learning approaches restricted to new modular programme only*
- *Lack of resources (learning packages) affecting implementation of student-centred learning*
- *Most students placed at parental choice school thus effectively choosing vocation to follow*
- *Teaching methods used in schools influenced by Ministry*
- *Most difficult aspect of student-centred learning to implement is giving students more responsibility for own learning*
- *Staff have to pay for their own staff development outside of school*
- *Teachers undervalued*

5. STUDENT GROUP INTERVIEWS

One group of students, representing the 'modular courses' was interviewed at each of the seven schools visited. A set of sample questions was prepared beforehand, complete with prompts if required (Appendix 11). Each interview lasted about forty

minutes and in all cases teachers and directors were respectfully asked not to be present, which they all unhesitatingly agreed to, recognising that their presence might inhibit responses. It was of course stated that no controversial questions would be asked and directors had access to the questions. Here follows the main findings from those interviews. A summary of the findings will be given at the end.

School / Interview 1.

This was a larger group than anticipated, sixteen in all, which had the potential to be difficult to 'manage' in terms of getting everyone's view over in a satisfactory way. In the event, despite the fact that some members were clearly more prepared to speak than others, agreement was, in the main, clear.

The main method of teaching was clearly 'lecture' and 'copying notes off chalkboard', with 'discussions' very rare and 'groupwork' used only occasionally. The concepts of teacher and student-centred learning had to be explained but when a list of characteristics of both were read out they were able to say which approach they mostly represented. With this information they were able to elaborate more about teaching methods used by giving examples, saying that 'question and answer', 'project work' and 'practical work' were used as 'scl' methods. They claimed the following to be their preferred approaches: 'students having more responsibility' (all agreed); 'more active students'; 'assessment based on performance and knowledge'; lots of 'group and teamwork'; and, 'individuals learn at their own pace'.

When asked how student-centred learning was benefiting them they all responded positively that it was 'more motivating', and that it has 'more emphasis on practical' and 'quicker learning'. Mixed response to 'more real learning' and definite no to 'becoming more responsible' and 'developing as individuals better'.

The students were asked a hypothetical question about comparisons between their course/ teachers etc., and those in the Western EU countries. Apart from the more resources issue, they were extremely partisan / supportive and convinced their

teachers were better, even though they (rightly) said they could not judge any of the options because they had not been there etc.

Those students who were at the school from the time of the project had noticed a difference in the teaching approaches used, mainly that there were now no oral exams and that they had: "...not trained previously". They did not like the 'system of points' in relation to assessment. In response to how the course can be improved they cited: less assessment, more teachers and teaching, more industrial attachment, new computers and materials.

All the group were to go on to HE, there was a view that it is impossible to get a job after the course because of lack of experience – it is a vicious circle. However they do see this course as better than previous system and that the assessment is now more precise.

School / Interview 2.

A small group of six all male students were interviewed. A couple of students were more confident in English than the others but the author was able to confirm agreement or otherwise with them.

The main methods employed included 'individual research', to a lesser extent 'group work', 'dictation' and 'copying notes off the chalkboard'. Although 'discussion' was not identified as a main method they all agreed they would like more of this. 'Practical activities' were used very frequently, for example constructing pipework systems. Most thought that 'groupwork' would be better. They did a lot of drawing but no 'problem solving'. " *The teachers give the information out all of the time*". They would like to do more problem solving. They claimed to use 'learning packages', which backs up what the Assistant Director said. The author saw one in the final stages of production by a member of staff. When asked about taking on more responsibility the reply was: " *If you only listen and copy notes, it is not sure you understand everything. When you perform later on, you get into difficulties because you have not understood the whole thing*". No formal individual tutorials take place.

Overall they thought that the course was as good as it could be, in fact some thought that a longer course would give more practical opportunities. The response about more resources and more industrial placement in the UK were expected but the students were confident that students in Bulgaria were better behaved and teachers were better trained in Bulgaria. Otherwise no other key differences. All were confident of continuing to study beyond their next HE course: “ *We need to continue to study*”. It was by no means going to be related to their present vocation however. Most did feel positive however, that there would be jobs for them in their particular industry eventually.

School / Interview 3.

This was a small group of students and the first thing to note was that on describing the differences between teacher and student-centred learning methods, most preferred to take notes off the teacher rather than be more actively engaged. The main methods in use were ‘question and answer’, ‘dictation’ and ‘copying the notes off the chalkboard’. Some students did think a combination of approaches would be useful. New methods were: “...*good methods but step by step to increase level to reach UK level...*” required. No individual tuition on the course. Most students thought teachers were stricter in EU but less trained than Bulgarian teachers. The comment was made that their teachers stimulate us to think. When asked for possible improvements to course less assessment, more teaching, more realistic tasks, more industrial attachment and a longer course were cited. In relation to comments on groupwork it was said: “...*it is difficult to study on your own...*”. Everyone intended to go on to HE, some perhaps part-time with another job. The most interesting comment of the whole session came when it was mentioned about students taking more responsibility for own learning in scl: “...*yes, but are we ready to take it...?*”

School / Interview 4.

This was a large group of fifteen Year Eleven students. The main teaching approach in the classroom was said to be ‘lecture’, ‘discussions’, ‘demonstrations’ and ‘group research’ with ‘dictation’ being used ‘sometimes’. Having explained the term student

centred learning and differences between 'traditional' teaching, the students decided that they did in fact have a lot of responsibility anyway in the learning process. An example of 'scl' was the project work where students have to make garments. It was interesting to note during observations that on the traditional courses the complete work was assessed 'out of six', whilst on the modular course it was assessed according to separate points, all out of six...Students said they preferred to have 'scl'. They identified all the key 'scl' characteristics including "*... being able to understand the subject matter better*" although not all present on the course they were quite sure that the main approach was 'scl'. 'More realistic practical work' and 'projects', 'more resources', 'less teaching' 'more research', less work generally and 'more work experience' were cited as desirables to improve the course. A resounding no to a longer course! All these students wanted to go on to HE. There were mixed views on the job prospects after the course. It was more likely that they would continue to study beyond HE as a result of their experiences on the course.

School / Interview 5.

A combined group of Year Nine and Year Ten students were interviewed. The main teaching methods used included 'lectures', 'discussions', 'question and answer', 'dictation' and 'copying notes off chalkboard'. Some individual reading and research was done. The approaches were said to be mainly teacher centred but they would like to have more student-centred work. They thought this would result in having 'more responsibility', quicker and 'more realistic learning', more interesting and motivating. They said: "*... although it may involve more work, you would learn more*". Presently little 'scl'.

Working in groups was a preferred approach: "*...it is easier...many ideas...easier to solve problems*". Students were not keen on 'having tests every day' and having to prepare for them. They did notice some changes as a result of the project: "*...in the beginning more dictation and teacher speaking...more discussions now*". They considered the new teaching methods much better than previous approaches.

In terms of improvements, they cited less assessment, more industrial attachment and more practical (and more sports...) as important. All planned to go into HE, several with other directions in mind. Most thought that they would continue to study. "*With our profession we have to continue to learn*". All students enjoyed the course and considered it better than the other traditional courses at the school. They could approach 'some teachers' if they had any problems.

School / Interview 6.

This group of nine students spoke very good English, most want to go onto University after this course. Main teaching methods used included 'lecture', 'discussion', some 'individual research' and lots of 'dictation' and 'taking own notes' or 'notes of the chalkboard'. When the difference between teacher-centred and student-centred learning was explained they said that there was not enough time to get all the information so the pressure was on providing this rather than spending time on anything else. They claimed they were not passively learning however because they constantly answered questions. They did give examples where 'scl' was used, eg. In problem solving and discussions during psychology or history classes. They thought that 'scl' would be more interesting and motivating. They thought that it would be difficult to 'work at own pace' because of 'lack of time' as mentioned above. No agreement on whether quicker or not to learn. They would like more practical, they said the practical was all in the final year which contradicts what the Director and her assistants said, they said they had one day every week for the whole of the time they were on the course and two days in the last year. They said that assessment needed to be based on performance not just notes. They were not really 'assessed on performance'. They needed 'more realistic tasks': "*...they never apply the information*". They would definitely welcome more 'scl'.

School / Interview 7.

Five students in their second year of the course (Year Nine) and aged fifteen / sixteen were interviewed. The actual courses they were on are mathematics and 'informatics which is basically computer programming and associated skills. The course duration

is five years with an optional one year extension. Again, this group spoke very good English.

The main teaching methods experienced were 'lecture', 'question and answer', and, 'dictation'. Sometimes, 'student presentation' work and 'individual research' is done. They said there are: "*Lots of examinations*". When differences between teacher and student-centred learning were explained, most of the characteristics associated with it were not present on their course: "*In some classes – depends on the teacher, some teachers leave you to think*". They did groupwork only very rarely. They claimed that as students they could set the pace of the learning. When this was probed further they said it was not as a class but as individuals. When asked whether they were assessed on performance or knowledge they pointed out that they must be assessed on both but in actuality it seems they are mainly assessed on knowledge. Passive student learning is prevalent in subjects like biology and physics.

Although there was not a lot of evidence of student-centred learning, they did see the benefits of such approaches as being: 'more motivating'; 'quicker learning'; 'becoming more responsible'; and, 'able to develop as individuals better'.

It came out that there was no formal system of individual tuition in place although if they required help they could get it.

Typical practical tasks they did were computer based followed by answering knowledge questions. Students would welcome 'more realistic practical tasks', 'more industrial attachment', 'less assessment' on modules and, "*...although the teachers are very good, they need specialists to come in*".

The group feel unique given that they are the only group out of many to be following a (partly) modular course and all that it entails. They like their course and are very supportive of it. Students on other courses in the school however, definitely do not want to follow their course: "*...they think we are not being taught very well. It is not true, they are envious. They think they know more than the teachers*".

One cannot help thinking that if the Director thought that the modules were too easy etc. this feeling might have permeated through members of staff and down to students which would be a shame for these students. The students certainly do not appear to have let comments by other students affect them, they appeared confident and enthusiastic.

Key findings from student group interviews

- *Lecturing, dictation and copying notes off board are the main teaching methods used in class*
- *Students would like to have more student-centred learning activities and be given more responsibility*
- *Few students intend to pursue the vocation they are currently following*
- *Most students intend to go to university and follow completely different career path*
- *When student-centred methods are used, students more motivated*
- *Would like less assessment*
- *Would like some industrial attachment*
- *Students very supportive of teachers in relation to their perceptions of teachers in Western Europe*

6. CLASSROOM OBSERVATIONS

Twenty-eight classes were observed across all seven schools visited. At least three classes at each school were observed. The average time spent in each class was twenty-six minutes. The author devised an observation checklist to assist him in logging and identifying activities (included as Appendix 9). For the purposes of data recording and analysis, the author devised a shorthand 'code' for identifying in the text overall judgements on approaches to the sessions described. All the details are given in Appendix 10. The descriptions are necessarily brief but to the point.

In the Bulgarian Vocational Schools, as with most other schools, the day is split up into thirteen forty-minute sessions, with a ten-minute break in between each. The first starts at 7.30am the last finishes at 18.30pm.

This created both opportunities and constraints for the author. Opportunities from the point of having more access to 'starts' and constraints from the point of frequently having to wait for a suitable start time. At other times, the author was allowed access mid-way through sessions to make best use of available time. In some cases, the Director remained with the observer. It is not uncommon for Directors to observe their staff as part of general teaching evaluation / appraisal. Whilst it can be argued that the activities in class may change as a result of the presence of outside observers, given the above observations, the author feels that within this Bulgarian context, the presence of Directors did not significantly affect activities.

This was one of the areas that posed more difficulty for the author than he anticipated. Observing lessons is not an unusual activity for the author, it is a regular part of his 'day job' as a teacher-trainer. However, within the context of this research, different judgements are having to be made regarding the activities taking place in the classroom.

Rather than judge the actual performance of the teacher in terms of his or her overall effectiveness in creating a sound learning environment for the student, this research requires different judgements to be made. These are not necessarily based on the effectiveness of the session, but on the predominant and conscious approach used by the teacher during the session. The difficulty arises from the fact that any session can involve both 'teacher-centred' and 'student-centred' strategies. The judgement concerns making an overall decision based on frequency, predominance, application and results of approaches. Having said this, the quantitative data alone is not enough. It makes a significant contribution of course but it is the combined judgement based on the situation overall. Although this research is not about 'evaluating' the project, clearly the findings will, de facto, act as an evaluation on aspects of the project.

Based on the actual codes used to summarise the sessions, only seven sessions were identified as straightforwardly student-centred. However, in terms of student activity, a further six practical sessions and five classroom sessions displayed students 'actively' engaged, even though the sessions were largely 'traditional' in structure. In good traditional classes of course, one should always expect to see students engaging

in the learning process, albeit under much more of a rigid framework. On the other hand, students in eight traditional classes were largely passive, as were students in three practical sessions. In terms of overall student activity therefore, one could say that in 64% of observed classes students were active in the learning process, and in 36% they were passive. One would expect to see students active in practical and project sessions, even in a traditional system of course. However, on the basis of the observations, the author is of the opinion that only seven or 25 % of the sessions could be described as structured along planned student-centred lines.

Key findings from the teaching / learning observations

- *'Traditional' teaching methods including lecture, dictation and copying notes off the board the norm in most classes*
- *Student-centred methods seen in some classes*
- *Lack of student-centred resources like learning packages*
- *Students generally responsive and active in learning process despite few planned student-centred activities*
- *Student-teacher relationships very formal*

Overall Summary of Findings

The emerging picture resulting from the teacher questionnaires is that of a profession which, although it largely understands and accepts the benefits of a more student-centred approach, in reality, it is struggling to come to terms with the demands of the new curriculum and its associated teaching / learning methodology.

Although teachers are qualified in their respective professions, most have limited industrial or commercial experience in these professions. Most teacher-training was undertaken as part of the teacher's professional subject training. Short staff development courses covering aspects of teacher training are available, mainly at Sofia University, and teachers can be released to undertake such staff development. However, limited school budgets means that they must often pay for it themselves. This severely limits attendance at such events. There has been little organised staff development associated with delivery of the new curriculum since the end of the project. The 'new teaching and learning strategies' is restricted to use on 'the modules'. All other courses in the schools continue in the 'traditional' manner. There is little evidence of any cascading of 'new' methods outside of the module teams.

Most teachers have a basic understanding of the concepts associated with the new curriculum and the teaching and learning strategies involved, but a combination of factors has meant a limited implementation of the strategies. Although lack of resources is clearly an issue, the lack of training and encouragement to apply the new strategies is more fundamental. A perceived lack of Ministry direction/will in this is also affecting teacher motivation. Within individual schools, there are 'pockets' of staff with the desire and motivation to expand implementation but are given little encouragement or the time/resources to do so. This does vary between schools and there are some indications that the school leadership style may influence this. This is discussed in Chapter Seven.

The teachers interviewed were drawn from across, but not from all the schools used in the sample. They included staff who had attended some of the seminars and staff who had not. Although the interviews were relatively few in number, one can see several

emerging issues. Chief amongst these are the following: a lack of resources and general lack of Ministry support for the changes; lack of self-esteem in terms of perceptions about how society views teachers – ‘evidenced’ by their lack of pay; lack of application / limited use of student-centred learning approaches; lack of will / confidence to move from traditional / conservative approach. Whilst this is the emerging picture based on the evidence thus far, it does not mean that student-centred learning is not being implemented at all. It does mean that contextual and cultural factors surrounding the situation are conspiring against effective implementation.

In the main, the interviews with directors told much the same story as the teachers. One point to note here is that the first three Directors interviewed were all delegates on previous ‘new strategies’ or ‘assessment’ seminars, who had all achieved promotion since the end of the project. Such promotion does not carry with it any significant salary increase but does carry with it not only more respect within the system but also more responsibility. One important thing to note is the fact that two of these were younger therefore perhaps not as steeped in tradition and more open to promoting new methods than their ‘more mature’ counterparts in some other schools. Of this sample, these new directors represent 29% of the total. If this is a trend then it may have significant impact on the future regarding implementation of student-centred learning. Although there was a certain amount of taking the ‘party line’, which could have been expected from school directors, there was also a surprising amount of candid and forthright talking. One could have perhaps expected some differences in perception about how effective or otherwise implementation has been, but as already stated, much of what came out during these interviews supported what the teachers said.

So far, this summary of the findings has focused on the views of the providers or ‘deliverers’ of the learning experience. This has resulted from anonymous survey questionnaire findings and face-to-face interviews involving both directors and teachers from the schools. We now need to consider the views of the students.

The findings here produced a mixed picture. Although there is some evidence of a gradual move towards use of more student-centred learning approaches since the end

of the project, it is slight. The predominant approach remains traditional and teacher-centred, with limited use of student-centred strategies. Most students do like and recognise the benefits of having more responsibility for their own learning and they would welcome more student-centred approaches. However, this system is still very much geared around the teacher as 'purveyor of information'. The main student-centred activity revolves around their 'workshop' practical activities. Students thought that these needed to be more 'realistic'. Even though students said they did not know enough about the UK education systems to answer the hypothetical question regarding how they perceived differences in certain areas, most groups were prepared to say that Bulgarian teachers were 'better' than their counterparts in the UK. Without anything to base this view on, this was an interesting response, which could be likened to a very partisan, national pride in support of their own teachers. When linked to the retention of the 'six-point' assessment regime as a means of allocating prizes, this provides further evidence of the competitive nature present in the Bulgarian system (see also footnote on page 204)

A key point to come out of the interviews, something that was initially raised during the interviews with directors, was the fact that the majority of students saw their courses as merely a 'staging-post' to HE. Few students spoken to had any intention of following the vocation they were currently being trained for. The 'academic / vocational divide' concept seems as much alive in Bulgaria as it is in the UK. Most students saw HE as the only real route to securing a job. There was a certain fatalistic view regarding the lack of job opportunities for them. Whilst one can understand that the economic situation in Bulgaria might well have created an employment problem, one may have thought that to secure good vocational qualifications might actually provide more opportunities than a more academic qualification. Whilst this was not a focus of the research, it is something that does warrant further investigation in the future: The actual parental influence in choice of vocational school and the subsequent move to HE.

As far as this research goes however, the final evidence source involved actual observations of learning and teaching taking place. In a sense this could be seen as 'closing the circle' in order to provide the final piece of the jigsaw in terms of

establishing to what extent 'new teaching and learning strategies' have been implemented in the secondary vocational system.

On the basis of the observations, whilst it is clear that student-centred learning has a presence in most of the schools visited, the predominant approach used by teachers is traditional and teacher-centred. Things are not so simple however, and it is to the next and final chapter that we have to go in order to bring together all the findings and discuss their relevance, relationship and significance to the whole research.

CHAPTER 7

ANALYSIS OF RESULTS

As evidenced in the previous chapter, the author used a combination of approaches during his fieldwork in Bulgaria to assess the extent to which 'new and innovative' teaching strategies had been implemented in the vocational secondary system. More specifically, the author wanted to explore the extent to which contextual and/or cultural factors either assisted or hindered such implementation. Inevitably, this would also reveal details relating to the wider applicability of the modular curriculum within which the new strategies were first to be implemented. In discussing the research findings, the author intends to focus on selected 'key findings' identified in the previous chapter. Those selected will best illustrate and / or underpin the key focus of the research. For clarity, the discussion will be considered under separate 'themed' headings.

In the introduction, the author made reference to the practice of importing or 'borrowing' educational systems or initiatives from one country, in the expectation that they would be as effective in meeting the needs of the students, employers and the wider society in whichever other country they are established in. This forms one of the key themes of this work. Such a 'prêt-a-porter' approach is but one manifestation of globalisation. Whilst this may be quite successful for many things, and indeed bring many benefits to a wider population, when applied to educational settings, things are not so straightforward. This point is discussed at length in Chapter Four. However, Broadfoot (2001), relating this issue to the policy makers associated with the production of human capital, sums it up well:

"There has been, as a consequence, a growing tendency to 'borrow' policies and practices that appear to be effective in achieving high educational standards. And yet the research evidence suggests, that the powerful influence of the particular national setting and the potential significance of the cultural context into which such policies will be imported ought to receive as much, if not more, attention."
(Broadfoot, 2001 p261)

Whilst the author believes that expertise and invention are there to be shared, and that with careful selection, aspects of educational systems *can* be successfully exported, the author is equally of the opinion that culture and context can have a profound effect on successful implementation in new settings. Definitions and the meaning of culture were discussed in the methodology chapter, but it is a notoriously difficult concept to define (Billington et al, 1991; Geertz, 1993; Griswold, 1994; Hofstede, 1991), it is much easier to identify what characterises culture. However, it is worth providing a further definition here:

“ Culture consists of patterns, explicit and implicit of and for behaviour acquired and transmitted by symbols, constituting the distinctive achievements of human groups, including their embodiments in artefacts, the essential core of culture consists of traditional ideas and especially their attached values; culture systems may on the one hand, be considered as products of action, on the other as conditioning elements of further actions.” (Kroeler & Kluckhohn in Brislin et al, 1973)

Whilst such definitions enable us to understand the differences between nations, we can equally apply such definitions to organisations. This research is concerned with the implementation of certain teaching and learning strategies within not only a Bulgarian context, but also within specific organisational contexts. The culture that exists within a typical secondary vocational school will exert as significant an influence on developments within the school just as much as the fact that the teachers are Bulgarian and not, for example, English. Therefore, in interpreting the research findings and discussing them relative to culture, the author will also consider the prevailing organisational culture of the setting. In fact organisations *are* cultures. ‘Culture’ can also be seen as a metaphor for organisations.

In his influential publication ‘Understanding Organizations’ (1993), Charles Handy refers to organisational cultures in terms of how they convey:

“...the feeling of a pervasive way of life, or a set of norms. In organizations there are deep set beliefs about the way work should be organized, the way authority should be exercised, people rewarded, people controlled.” (Handy, 1993 p181)

This is in keeping with the broad definitions of culture discussed in Chapter Five and at the beginning of this chapter. Handy identified four distinct types of culture that

can be found in organisations: power culture; role culture; task culture; and, person culture (Handy, 1993). Handy linked these to the four 'National Cultures' identified by Hofstede: power distance; uncertainty avoidance; individualism; and, masculinity (Hofstede in Handy, 1963 p196). The first two of these: power distance culture, in which the equality of power distribution between bosses and subordinates is measured as high or low; and uncertainty avoidance, linked to controlling the future, authoritarianism and traditionalism, can be seen to best reflect the situation within the Bulgarian VET system (see the section 'school culture, teachers and society' later in this chapter).

The author now intends to explore, identify and discuss, exactly what cultural link there is between the 'new and innovative teaching and learning strategies' and the effectiveness of their implementation within both the school as an organisation and the Bulgarian system overall.

Background, experience and gender

The research established that most teachers and directors in the system are mature and have been well established within the profession for a number of years, well before the introduction of the UVET programme. Having worked within the very traditional and conservative system for some years, a system that values knowledge acquisition very highly, any significant change to this philosophy must have been difficult to come to terms with (Phipps et al in Watts & Walstad, 2002). Significant changes which fundamentally alter the actual role of the teacher in the classroom, effectively removing the 'purveyor of information' role, central in the traditional Eastern European model of education, must be even more difficult to take for teachers steeped in this tradition. Historically, in Bulgaria, vocational education was seen as a continuation of general education. Subsequently, there are a lot of general subjects taught at this level, and this continues to be the case (ETF, 1999c; Phipps et al in Watts and Walstad, 2002). However, Articles twenty-seven and twenty-eight of the Vocational Education and Training Act 1999, states that the time spent on vocational subjects should be at least one-and-a-half times that spent on general subjects.

Traditionally in Bulgaria, as in all other communist states, the teacher's principal role was in shaping the country's youth.

"The Bulgarian Communist Party (Party) used education to shape students into good communist citizens, loyal to State and Party (Phipps et al in Watts & Walstad, 2002 p 132)

Whilst the situation may be somewhat different now, significant educational reforms still take time. With such reforms being dependent on the implementers, teachers in this case, their traditions and practices, and of course their personal philosophies, developed over time, will all have a great bearing on how quickly they sign up to the new reforms. Interestingly, whilst the survey showed a largely 'mature' profile in terms of age, the attendance at seminars during the project was more variable. Delegates attending some seminars were predominantly younger and newer entrants to the profession. It is also clear that few teachers have any significant commercial or industrial experience, regardless of how long they have been in the profession. Whilst this in itself would pose problems of relating theory to practice in the classroom (Nielson, 1999), the move away from a 'knowledge-based' curriculum to one based on 'performance outcomes', must concern vocational teachers in Bulgaria greatly. Whilst vocational institutions in the UK, for example, put a great premium on commercial or industrial experience, in order to train and pass on industry standard skills and competencies to their trainees, this is not always the case in Bulgarian vocational schools. The transmission of knowledge in order to pass examinations is still seen as one of the most important aspects of a teacher's role.

The practical skills of the vocational teachers here, is largely restricted to what they covered during their own vocational school training. Parkes et al (1999) refers to VET teachers generally in CEE as being relatively unskilled with no work experience. However, according to the OECD, commercial and industrial skills for vocational teachers are required in all countries (OECD, 2000). The research did not show whether staff development in the area of occupational skills updating had ever taken place, but issues related to lack of staff development generally, came through very strong in the research. Although most directors claimed that their staff were sufficiently trained for the new programmes, five out of the fourteen questionnaire

responses from directors (36%) said otherwise, suggesting that there are gaps in provision. What may add weight to this, is the likelihood that you would not expect directors of schools to 'admit' that their staff were insufficiently trained, particularly in what the author perceived to be a very competitive educational environment²². The retention of the 'six-point' assessment regime, discussed in Chapter Six, also adds weight to this. One can also infer here, that given the low pay of teachers, which is discussed below, skilled practitioners in the various vocational areas will not be attracted to teach in the schools when they can earn three times the teacher's salary in industry. In fact there is evidence to show a small 'migration' the other way for those teachers with appropriate skills to market.

Although at the outset of the research the question of gender was not meant to be an explicit thread to be pursued, the author does feel it has cultural significance. Whether or not this has a bearing on the implementation of student-centred learning particularly, or the programme overall may be difficult to identify. It may even be worthy of further research. The following observations in this area are simply included to provide additional context to the research rather than provide comprehensive data to support any hypothesis. What is clear, is that most teachers in the Bulgarian vocational education system are female. This reflects the situation in the countries of the Russian Federation (OECD, 1998).

Six out of the seven directors interviewed were female and all nine teachers formally interviewed were female. Sixty-six percent of teachers observed were also female. Although the questionnaires did not ask for gender details, the author's interpreters, using their far from scientific methods but undoubtedly accurate intuition...claimed that the vast majority of responses were from women, both directors and teachers. This was effectively confirmed during the interviews with directors, most saying their staff was approximately eighty to ninety percent female. A fact that the author has no reason to disagree with, given the profile of teachers who attended the various

²² In the middle of one classroom observation, a loudspeaker in the classroom suddenly burst into life to announce the success of their school in an inter-school language contest. This was greeted with loud cheers. In student interviews it was clear that students were highly partisan in terms of rating their teachers with teachers from elsewhere.

seminars he was involved with. The questions are, why is this the case? and, what is the significance, if any? The former question is easier to answer than the latter one. Pay is certainly one significant factor here. We have already established that teacher's salaries in Bulgaria are low (Phipps et al in Watts and Walstad, 2002). Traditionally, the bread winner in Bulgarian society is the male, therefore any occupation that pays more than teaching will of course be more attractive, which, according to teachers at least, covers practically all other occupations in Bulgaria: "*The (teacher's salary is equal to the social aid for the unemployed...it is more difficult to work...teachers are not motivated.*" (teacher quote) Whilst this view is much less the case in Western Europe these days, it is still very much the case today in transitional Bulgaria. Hence, teaching is not populated overwhelmingly by men. There may be a further reason, although again, the author is careful to point out that this is speculative rather than based on any specific 'hard' evidence. There may be a 'role-model' dimension to this. Female students may see female teachers as possible role models and may be motivated to emulate their careers. This is perhaps less likely to occur with male students seeing their, largely female teachers, as role models to follow. Of the twenty-nine classes that were observed, female teachers outnumbered male teachers two to one. Whilst this does not quite reflect the eighty to ninety percent claimed by directors, it is nevertheless significant. A further interesting observation was that when directors were making third-person references to their staff, the term 'he' was invariably used.



Fig.6. Group photograph illustrating typical gender profile

So we appear to have here, a more or less self-perpetuating situation in which the future profile of vocational teachers in Bulgaria is likely to remain largely female unless there is some dramatic upturn in the economy that impacts positively on teacher's wages. But what of the consequence of this? What, if any, is the significance? This is much more difficult to answer. It has been stated several times that teachers have shown enthusiasm for student-centred learning, yet there has been no significant implementation evident. So whilst there is a gender imbalance, further research will be necessary to establish how, if at all, this is impacting on implementation. As far as this work is concerned, it is nevertheless a cultural dimension that needs to be noted.

Training and staff development

It is clear from the research that the only real exposure to teacher training most teachers have had, was during their professional training, which in most cases consisted of a 'pedagogic' element in their course rather than any substantial course of teacher training in itself. The MES themselves recognise the limitations of their vocational teacher training system:

“ Initial teacher training frequently takes place in parallel with study in the specialist vocation and the teacher training qualification can be gained without teaching practice or the need to demonstrate ability as a teacher.” (MES, 1999a, p21).

Given the ‘mature’ profile discussed in the last section, in most cases such training must have been several, and in some cases *many* years ago. Although teachers can, if they wish, go on staff development courses outside of the school, usually to the ‘Department for Information and Upgrading of Teacher Qualifications’ at Sofia University ‘St. Kliment Ohridsky’, there is no financial support for this. The few extra Leva that such courses attract²³, on top of the low wages teachers receive, provides little incentive to do this. Subsequently very few teachers actually attend outside staff development courses. The research shows that most teachers felt that teachers generally lacked the skills necessary to implement student-centred learning effectively. Phipps et al sum this situation up well:

“ Bulgarian teachers are familiar with a didactic, formal method of presentation, and seem to be trained in the methods during pre-service education. Basic ideas of questioning (inquiry), critical thinking and other student-centred interactive methods are, so far, part of ‘the new way of thinking’ that only international organisations have encouraged Bulgarian educators to adopt and implement in their classrooms (Phipps et al in Watts & Walstad, eds., 2002 p141)

The British Council led consortium that the author was contracted to was one such international organisation. Regarding the cost to individuals for staff development, the UVET project provided free residential staff development and subsistence allowances to attend. In terms of numbers of teachers across the sector however, numbers were relatively small. The British Council final report for the project states as one of the project outcomes:

“A cohort of one hundred and thirty teachers familiarised with student-centred teaching methods.”(Table 2 British Council Project Final Report – undated)

This was reflected in the number of teachers surveyed who had actually attended the ‘new strategies’ seminars. The original plan was to train counterpart staff to ‘cascade’

²³ There are five formal ‘graduations’ of upgrading qualification vocational teachers can achieve in Bulgaria, each one attracts a few extra Leva per month.

the approaches throughout the system. Few people however, were put forward by the Ministry for this training.

It must be noted here the actual extent of the Pilot Programme under the PHARE project. Originally it involved thirty-five pilot schools throughout Bulgaria, covering eighteen vocational occupations. In the main, one vocational course in each of the pilot schools formed part of the project. In most schools this was a very small part of their overall provision. For example, at the Maths School in Sofia, only one out of forty courses offered there formed part of the programme, all other courses continue to run along traditional lines: *"It is not very good – the fact that you combine traditional teaching with modular from an early age. History, geography and modules go together."* (teacher quote) So the modularisation pilot programme and all that it entailed, was set in the midst of the very traditional Bulgarian system. Given the fact that there has now been an extension in the number of schools to fifty, involved in delivery of the new modules, without the staff development one must question whether the new pilot schools' staff are equipped to effectively deliver the new curriculum: *"...we need trained teachers, material conditions and equipment...it must be the will and desire of the teachers."* (teacher quote) It has also been revealed in the research that some key staff, whom were part of the modular teams and who attended the seminars, have left the system. Again, this must have seriously compromised the sustainability of the project

Teaching methodology and new strategies

The research shows that there *have* been changes in approach as a result of the UVET project; indeed, the author saw some very effective student-centred activities in some classes. One crucial thing that the research did show however, was that the teaching methods used in schools is controlled carefully by the Ministry, and the 'new strategies' are restricted to use on the modular programmes only. This has also been identified in other studies, albeit more related to the content of courses rather than the teaching methods adopted:

“...the Ministry of Education continues to retain tight control over the compulsory courses. It specifies what subjects are required and the course syllabi for these subjects. No teacher or administrator is allowed to make any changes whatsoever in these elements” (Phipps et al in Watts & Walstad, 2002 p 134).

Quite apart from teaching methodology, the Ministry also exerts influence on the overall assessment strategy used in schools. The continued use of the six-point scale to express student performance is a good example. This approach is somewhat at odds with the principle of competency-based training. Outcomes based on performance criteria are somehow converted to produce a grade from one to six. This is used as a descriptor for allocating prizes to students. A traditional (cultural) way of rewarding success. The very nature of the assessments were seen by some to be inferior, an issue that has further cultural connotations and has been recognised in the past by the Department of Trade and Industry (DTI):

“...the credibility of assessment and, by extension, the qualifications, is challenged by cultures that give much higher status to external assessments and question the credibility of localised assessment by immediate superiors.” (McGregor in DTI newsletter No.4, 1995 p17)

Whilst there has been no conscious effort to prevent dissemination of the new approaches beyond the modular courses, equally, there has been no systematic means of sharing the approaches. However, ‘teacher trainers’ were appointed in each of the pilot schools to help fulfil this function. The research shows however, that the position is ambiguous with no clearly defined role. It appears to be a combination of internal verifier, module team leader, counsellor or someone to simply disseminate information about the modules. The teacher-trainer is supported in each school by a module team to assist in disseminating module information. Although a significant number of questionnaire responses from teachers said that they had responsibility for the way they taught, in both questionnaire responses and interviews, as already pointed out, the Directors and/or Ministry have been identified as having a key controlling influence.

Some sharing of good practice has however been achieved although it does not appear to have extended to actual training in the use of those methods. What is clear, although the results vary between the schools surveyed, is that there has been little

formal staff development since the end of the UVET project. The momentum has effectively diminished with time. This is not entirely unusual of course when project money dries up. One can see how motivation and enthusiasm can be severely tested as a result of this. Even after a particularly good staff development session or conference, initial enthusiasm often wanes once delegates return to their place of work. The knowledge that there will be further sessions to develop and consolidate new knowledge and methodologies, however, can be enough to sustain motivation. However, when a project finishes, if there is no follow-on development, progress will be limited. As described in the previous chapter, one of the teachers who has since left the system, informed the author:

“ The impetus to change slowed down from the end of the project” She also added that she felt: *“ that she was learning nothing new.”* (Teacher interview, 2002)

What can be said, is that both teachers and directors understand the concept of student-centred learning and acknowledge its benefits both for students and themselves. Indeed the students themselves also recognise the benefits and would welcome being given more responsibility for their own learning. They say they are more motivated when such methods are used. Interestingly, this is the thing most teachers and directors think is the most difficult aspect of student-centred learning to implement. One must question whether in fact teachers are actually *prepared* to pass on to students this most traditional and important function of their job. After all, after years of being in control of all aspects of what happens in the classroom, to suddenly ‘stop teaching’ and get your students to ‘learn’ themselves, is quite a significant shift in the culture of the school. One must recognise that the teaching environment in Bulgaria is very traditional, very conservative and very formal (OECD, 1998; Kitaev, 1999; Phipps et al in Watts & Walstad, 2002). Whilst the days of indoctrination may be long gone, there is still a reluctance to give up the authoritative and controlling role that went alongside it. The fundamental change in emphasis from a teacher dominated classroom culture to a student focused one should not be underestimated. Such changes need to be carefully orchestrated otherwise problems may result.

Of course students as well as teachers need to be inducted into the new approaches. Although this was identified during the ‘new strategies’ seminars, the importance of it

may have been overlooked. Whatever problems exist regarding implementation, teachers claim that they would prefer 'to continue' using student-centred learning methods. However, as already pointed out, there is little evidence of widespread use of the methods. In the main, the commonest approaches observed in the classroom were lecturing, dictation and copying notes off the board. Although there has been some reduction in the use of such methods, there has been no appreciable increase in the use of, for example, 'group work' activities. The author does however acknowledge that more traditional approaches can be equally effective as part of an overall strategy (Wragg, 1999). One can only speculate however, on their use here as part of any overall teaching strategy.

Another key problem associated with implementation is the lack of customised classroom learning resources, particularly text-based and other media-based learning packages. Most subject areas are also short of up to date text books and other resources: Because of the low profit margins for publishers, very few translated texts are available: "...the lack of text books. Books are not published on time, there is a problem of accessing literature." (teacher quote) This is a problem experienced in other modernisation programmes (Nielson, 1999; Thomas, 1990; Phipps et al in Watts and Walstad, 2002). Although some training was given on the production of simple learning packages, few teachers have the time or motivation to produce them: "It is not a real module without the packages." (teacher quote) There is also some debate about who owns the copyright of such things when and if they are produced: "...an unpaid task to produce a book." (teacher quote) Teachers considered that there was insufficient support from the Ministry in providing resources and staff development: "The Ministry needs to continue to work on this project." (teacher quote) The author saw some interesting examples that have been produced, but this was limited due to the work and trouble involved in getting the material published: "...because of more work...not paid...need more state support." (teacher quote) There are virtually no such packages produced commercially for the Bulgarian market. Of more concern, already pointed out, is the relative lack of skills in delivering / creating student-centred learning environments. This is not to say such skills do not exist, they do, but in relatively small and isolated pockets. The large numbers of students in classes was also cited as a reason for difficulty in implementing student-centred methods, quite

understandable. However, only thirty-nine percent of observed classes had more than fifteen students present.

School culture, teachers and society

It has already been pointed out how poorly paid Bulgarian teachers are in relation to other professions. This comes through very strongly in the research. Linked to this, and more important as far as the teachers themselves are concerned, is the low status they say they are accorded by society in general: “ *The society doesn’t want to support teachers.*”; “*Its never been so undervalued like now.*”; “*Normally teachers are respected in Bulgaria. The last few years put the teachers in a very difficult social situation – they’re on last position regarding the budget. That’s why they’re not appreciated at the right value.*” (teacher’s quotes) This is impacting on teacher’s motivation and willingness to change, which is having an impact on implementation. More recognition combined with more pay would at least raise motivation levels within the profession. In his survey on teacher job satisfaction in developing countries, Garrett (1999) identified a combination of social context, attitudes, working conditions and salary as key determinants regarding motivation.

From the above, one can infer that the actual leadership style within any particular school can have a significant impact on teacher motivation. With the exception of salaries, even though the MES continue to exert a lot of influence, school directors can still have a considerable impact on teacher attitudes and the overall social and professional context / culture that exists within the school. Up to a point, dependent upon what resources are available and how effectively resources are deployed, directors can also influence the working conditions within the school. Thus indirectly, the successful outcome of any new initiative, in this case the effective implementation of a student-centred learning environment, within any particular school, may be influenced by the director’s own particular leadership style. Typical cultures that may be found in organisations have already been described in the opening paragraphs to this chapter and the Research Methodology chapter.

Although a quite different concept, the introduction of total quality management (TQM) in colleges in the UK over the past decade or so, has certain analogies in terms of how school / college leadership can affect implementation. Reviewing the literature on TQM, Holloway (1994) finds that the emphasis is on the need for leaders to demonstrate their commitment to the principles of it. Others go further stating that leaders need to act as:

“Mentor, guide, coach, counsel...educating, training and enheartening their staff to see TQM as a way to increase the opportunities they have to succeed and increase their own job satisfaction.” (Murgatroyd & Morgan, 1993 cited in Holloway, 1994 p123).

The principle can be seen to be much the same in the Bulgarian vocational schools regarding the successful implementation of student-centred learning. Certainly school directors are in a position to create an effective internal system of training and cascading the new approaches. This can be achieved by helping to create a positive environment based on mutual trust and understanding between all concerned – director, staff and students on the one hand and parents and industry on the other. Differences in leadership style may account for the differences in the results identified in Chapter Six, where one school was overwhelmingly in favour of student-centred learning (100% of respondents) whereas all the others were only recorded as between 50-60% in favour. The author’s impression at this one school was certainly that the Director was enthusiastic and keen to push the school forward, more so perhaps than at other schools. However, interestingly, at this same school, two teachers who had attended the seminars and were part of the ‘module’ team had recently left the school to pursue more lucrative careers in industry. So, whilst leadership style can have an impact on how the organisational culture develops and in turn how a particular initiative can be successfully embedded, it is not always clear exactly how this works. As Handy observes:

“...like motivation, the search for the definitive solution to the leadership problem has proved to be another endless quest for the Holy Grail...” (Handy, 1993 p97).

Quite apart from the influence leadership style may have on events, a key point to note is the fundamental change required in how a teacher carries out his / her role, regardless of other influences. This has been discussed earlier. Suffice it to say that teachers steeped in a very traditional, authoritarian system where they 'provide students with knowledge', to take this role away will remove what for many can be seen as their true source of respect in the classroom. Such respect is further enhanced when their students are successful in the regular inter-school competitions that take place. The author has already identified that there is a competitive cultural element within the system. Success is based very much on the effectiveness of the knowledge transmission in class. Any changes in this could have serious consequences for teachers. For a profession already lacking in motivation due to the low status they are accorded (De Grauwe, 1998), one *can* appreciate within this context, a reluctance to change from what could be described as the 'one-way flow of information' model and move the focus from 'teaching' to 'learning'. The old adage 'speak when you are spoken to' is brought to mind:

"The desirability of having students speak up in class is more strongly felt in individualist than collectivist cultures. Because most collectivist cultures also maintain large power distances, their education tends to be teacher-centred with little two-way communication." (Hofstede, 1991 p62)

Another key finding that came out of the research was the overall role played by the vocational schools in determining student's careers. Certainly as far as parents and students themselves are concerned. Because students start in these schools at the age of between thirteen and fourteen, which is within the compulsory school age range, it is the parents who choose the school for their children. At this young age, they are referred to as pupils at school and this teacher / pupil relationship persists throughout school life. Even in their final year at vocational school, aged eighteen or nineteen and now several years beyond compulsory schooling, they are still often referred to as pupils. Whilst this is only terminology of course, they have been disciplined in this way over some years, and therefore act at school more like 'pupils' rather than students or young adults (ostensibly) training for a vocational occupation. They are very respectful to adults in school, for example standing whenever an adult enters a classroom. In itself, there is nothing wrong with this; it is even laudable in many

respects. But this does characterise the relationship they have with teachers – it is very formal. In order to create an effective student-centred learning environment, some of this formality needs to be broken down. A climate of trust and shared responsibility must be established between teacher and students in order for student-centred learning to work effectively. This is not to say that teachers and students in Bulgaria do not enjoy a good relationship with each other, they do. But in a rather ‘formal’ way: *“Student-teacher relationship more friendly in western classes.” (teacher quote)*

When parents choose the school their children go to, they often pick schools that they themselves went to in their youth. Effectively, in choosing schools for their children, parents are choosing their children’s future vocational career: *“When students start at fourteen they don’t know what to do so parents decide.” (director quote)* Except that in this Bulgarian context they are not...in all but a few cases, students saw their vocational schooling merely as a stepping-stone to higher education and university. Although these pilot schools have been chosen on the basis of their specialist provision, it is accepted that few will actually continue in the particular vocation they are apparently training for. The MES say over 60% of all secondary graduates currently proceed to university education (MES, 1999a, p9).

“Their (students) choice of one or another institution is not determined by the educational services provided but by other circumstances. Sometimes it is the opportunity for gaining access to some sort of service which is coincidentally available during the course of study, and sometimes it is to realise their parent’s ambitions for a particular social status for their child through placing him in a prestigious educational institution.”(Schachimanyan in Griffin & Bailey, 1994 p188)

With career opportunities in a number of specialisms limited, this is not surprising. This situation may also be having an impact on teacher motivation...training students for a vocation that they have no intention of following.

Summary

A number of key cultural and contextual factors have been identified and discussed here that are impacting on the effective implementation of the new strategies in teaching and learning. These can be summarised as follows: The majority of teachers

and directors in the system have been there for many years and are steeped in the very traditional and conservative approach to education common in CEE; Few teachers have any significant industrial or commercial experience; Teachers receive very low pay; Vocational schools do not attract skilled practitioners from industry; Staff development is not supported by funding; Key staff are leaving the system; There is close Ministry control of the teaching methodology used in the schools; There is a reluctance to relinquish 'control' of classroom activities and give students responsibility for learning; There is insufficient support in providing resources and staff development; Most students do not follow the vocation they are trained for; Most students go into higher education to study subjects unrelated to their current vocational studies; There is a lack of incentive and motivation for teachers to change approaches; The focus is on 'teaching' rather than 'learning'. In addition to the above, although not significant in terms of the effective implementation of the new strategies, it is nevertheless culturally significant that the vocational education system is populated mainly by females. In the next and final chapter, the author will pull together the key strands and illustrate further, and conclusively, that the research objectives have been met.

CHAPTER 8

CONCLUSIONS

At the outset of this research, a number of questions were posed related to the long-term success and effectiveness in transferability of 'new' teaching and learning strategies. The key question was: what, if any, cultural and / or contextual factors have impacted on this transfer? The premise being, that teaching and learning strategies developed around and for a particular set of circumstances in one country, might be difficult to implement in another, quite different country, and by definition, a different cultural context.

Although two project evaluations have been carried out, and a separate case study produced, they were produced within six months of the end of the project. To the best of the author's knowledge, this is the first study to have taken place since that time, and the only one to look in depth at seven schools, using the range of research approaches as described in previous chapters. In this sense this will contribute additional information to the overall project evaluation. More importantly, in terms of originality, it is the only one to focus on culture as a determining factor regarding effectiveness of implementation. Therefore, in terms of the wider field of study relating to culture - in the anthropological sense, as defined by Geertz (1993), and the transfer of educational innovation, this case study will, by definition, add to this field of research.

The findings show quite clearly that there are a number of both cultural and contextual issues that have affected implementation. These have already been identified. In some cases, it is difficult to differentiate precisely between what is 'cultural' and what is 'contextual'. In many, if not most cases, they are inextricably linked. We have seen for example, that a particular 'culture' is defined by its identifying characteristics, whether they are 'rules' (written or unwritten), practices, traditions or iconography. The context within which a culture exists, for example the actual setting (building, organisation, region, country), resources available and outside influences and wider (government) power structures, will all, to a greater or lesser

extent have some impact on the culture's evolution. In this sense, one can see that the distinction between the two is often blurred, with different aspects of culture and context overlaid, one upon the other, as is the case here.

With reference to relevant texts and supported by selected quotes from directors, teachers and students, the author will now bring the findings from the previous chapter together, under appropriate headings, and make his concluding comments in support of the above assertion. In addition, observations and recommendations relating to future developments and the sustainability of 'new' teaching and learning methodologies will also be made, with reference to the prevailing context of education as a high earning export commodity.

Traditions and conservatism, age and experience

It was inevitable perhaps, that the historical socialist philosophy, if not the communist ideology that existed for forty-five years, would continue to cast a long shadow over any reform programme. Whilst many within the system want change and are working towards it, there are still those who find it difficult to do so. We have already discussed how this is an issue in the schools. The traditional socialist educational system, with its 'central control', whether at Ministry level or in the classroom, is still evident. At the classroom level, giving students some measure of control and responsibility, key characteristics of student-centred learning, is limited. At the school organisational level, control of what happens in the classroom is also evident to varying degrees, controlled by the director and in turn the Ministry.

"The inertia of the existing central planning institutions should not be underestimated and operates at a number of different levels. Managers and workers who have adjusted to the rhythm and inactive characteristics of the classical planned mechanism cannot be expected automatically to accept different roles, uncertain outcomes and general unpredictability in exchange for the promise that higher earnings are possible." (McIntyre, 1988 p 90)

Whilst older teachers could still hold out against innovation for ideological reasons, such barriers are unlikely to be significant:

“After ten years of transition and the attrition of many older teachers, the problem of ideological bias has waned significantly” (Phipps et al in Watts & Walstad, 2002 p 140).

The above comment was referring directly to the teaching of economics subjects and although clearly of more direct relevance in terms of that particular subject, the sentiments generally can be seen as relevant. Despite some changes, the research has shown that the system remains very conservative and traditional. Organisations and the people who work in them also have an innate ability to ‘absorb’ change in a way that actually results in no discernible effective change at all... *“From my experience, we know that everyone teaches how he can, not how he should. It is a very conservative system.” (director quote)*

“Schools are naturally conservative places. Teachers have a tremendous capacity to assimilate changes in such a way as to perpetuate existing modes of working. This applies as much to individual classrooms as it does to schools as a whole.” (West-Burnham in Davies et al, 1990 p94)

There are some positive signs of change however. For example there is evidence of an influx of new, younger staff into the system. Two of the directors the author interviewed were recent, younger appointments, both of whom had attended the ‘new strategies’ seminars. Another director told the author that she had recently appointed ten young, enthusiastic graduates. Such moves, if reflected across the system will eventually have a significant impact.

In time, as more young teachers enter the profession, problems related to conservatism will diminish. Furthermore, the Ministry recognise the need to attract industrial and commercial expertise and the right type of person for teaching generally by addressing the question of salaries:

“To provide high quality VET, the state must ensure that it can attract applicants of high calibre. These people are in demand in the growing areas of the private sector. They will not be attracted to a career in schools that are under resourced. Nor will they be attracted to a career in which starting salaries are low and salary increases depend more on years of service than performance.” (MES, 1999a, p21 par.7.2)

This is an admission of an important task that lies ahead. Having committed themselves to this area of reform, one must now hope that they will now implement the action required to ensure it comes to pass.

Teacher authority and status versus student responsibility

Natural conservatism and years of tradition could certainly be one reason for the relative lack of use of student-centred approaches in this case. As pointed out earlier however, the very concept of relinquishing much of the authority role and giving more responsibility to students, and the possible outcomes of that, might pose more serious reservations for teachers.

“Many professions, who may have authority issues of their own, are often uncomfortable with the dynamics that emerge. Despite their best efforts at giving legitimate authority back to their students, they may not know how to respond when students refuse to take it.” (Costello et al, 2002 p 119)

During one of the student group interviews that took place during the fieldwork, when discussing giving students more responsibility during student-centred learning sessions, whilst most of the group showed enthusiasm, one student cautioned: *“but are we ready to take it?”* A salutary observation. The following comment provides further caution:

“Self-directed learning pre-supposes a degree of self-confidence and the skill of using resources. Indeed, to become self-directing might form one of the goals of study rather than the means by which goals are realised.” (James & Coleman, 1998 p405)

If we consider the traditional role teachers have as providers of information and ensuring knowledge acquisition by their students, and relate this to some of the previously discussed competitive ways in which success could be judged. The removal of this accepted role could have serious repercussions:

“A challenge to established ways of working may be legitimately perceived as a rejection of all that has been done hitherto and, subsequently, the work and commitment involved with it. Those imposing changes may be implicitly rejecting a ‘lifetime’s’ work.” (West-Burnham in Davies et al, 1990 p94)

The sensitivity with which reformers should approach implementation, is also acknowledged by the OECD:

“The psychological motivation of those who implement change is important. It is vital that they establish a sense of ownership of and commitment to the new goals, which are best devised as a combination of ‘top-down’ and ‘bottom-up’ initiatives. Teacher confidence needs to be sustained so that in moving towards new practices, past work is not denigrated. Encouraging new styles of teaching should not entail a disrespect for much valuable work conducted over decades.” (OECD, 1998 p22)

The research has shown that whilst most teachers do want to give students more responsibility, in practice, such a fundamental change in role and the associated psychological implications, is preventing them from doing so to any great degree. The following teacher quotes help to illustrate this: *“...the majority of teachers would be happy to give students responsibility.”* But, in Bulgaria: *“The teacher is still central to the role.”* *“Internet has no room for teacher.”* This last quote points to the trepidation and apprehension associated with perceptions of what some teachers have regarding student-centred learning.

Whilst educational policy makers and reformers need to take account of such things, directors and teachers who do want to move things forward are hampered to some extent by bureaucracy: *“We are satisfied...but the system is too bureaucratic...(we need) easier published packages.” (teacher quote)*

The future: reform of vocational teacher training

As Nielson (1999) in his review of ‘needs, achievements and obstacles’ relating to vocational teacher training across CEE noted, the success of the VET reforms depends to a large extent on vocational teachers and trainer trainers. This is where the focus should now be firmly fixed, given its relatively low status in Bulgaria

“Typically, teacher-education is very traditional and not reflective of modern learner-centred approaches to instruction.” (Phipps et al in Watts & Walstad, 2002 p 137)

Under the reform programmes throughout CEE, including Bulgaria, as we have seen in this case study, teachers in pilot schools have been given introductory courses in

student-centred approaches, but more support is needed (Nielsen, 1999; Parkes et al, 1994; Bolton Institute, 1997). As indicated, this was recommended by the author and his colleague at the time of the initial seminars:

“The consultants strongly recommend that the existing system of initial teacher training (ITT) for vocational teachers in Bulgaria be upgraded and developed to enable it to respond effectively to the needs of a changing society by embedding within it an appropriate and relevant curriculum equivalent with that found in neighbouring European Union countries.” (UVET-Bolton Institute consultant’s report, 1997 p8 par.2.6.2)

The following quote could not be more appropriate and reflects many of the author’s findings and sentiments, as expressed above:

“Most of the teachers exposed to new methods of teaching have responded positively, but the key questions remain. Unless the new pedagogies become part of future teacher’s initial college training and preparation, will most teachers use them effectively? Even if some teachers do, can the new teaching methods endure in a system dominated by traditional courses and teaching methods? Will the changes introduced by international organisations receive long-term support from the Ministry and the schools so that these changes can become institutionalised ?” (Phipps et al in Watt and Walstad, 2002 p142)

It is clear that whilst much good can be done through this kind of project, the long-term sustainability and benefits that this can bring will be limited without continuing support:

“...two to three year projects occupy only a small time-span in the process of reform, even in Western countries and the terminating Phare programmes are leaving behind a great deal of unfinished business.” (Parkes et al, 1999 p7)

The arguments for a vocational teacher-training curriculum that emphasises student-centred approaches is well rehearsed (ETF, 1999b; Kitaev, 1999; Nielsen, 1999; Joyce et al, 1992; Poisson, 1998), what is required is a commitment by the MES and the donor community to help initiate this rather than go for the short-term fix in the expectancy that it will solve the problem. The MES have stated that they are committed to change and have tasked the relevant organisations and institutions involved with initial teacher training in Bulgaria to revise their courses:

“The MES will expect the revised syllabi to reflect the methodologies that are increasingly being used...It will expect increased focus on teaching practice and the granting of the qualification to be based mainly on satisfactory teaching performance. It will look to the institutions that provide teacher training to liaise with VET schools in order to provide the opportunities for students to teach...Those who train teachers will need to be aware of, and sympathetic to the new methods based on learning outcomes, student-centred approaches...” (MES, 1999a, p21)

It seems clear, and the research has illustrated, that it will be important to develop in Bulgaria a sound initial teacher training provision in order for the ‘new methodologies’ to be more effectively integrated into the system. It is crucial that the resultant programmes incorporate the practical application and practice of the new strategies. This may take some time however. In the meantime, it needs a concerted effort by the Ministry to re-invigorate the staff development process. Of course some questions do remain, about the overall principle of advising Bulgaria to adopt such a modularisation programme, and all that it entails.

Criticisms have always been levelled at those countries from the developed world that ‘export’ education more as a commercial enterprise, rather than for any higher moral obligation, to aid less fortunate countries (Bennel & Pearce, 1998; Hyland, 1998; Wilson, 1997). Education is big business, particularly where foreign students are concerned, whether at home or abroad. It was because of the marketability of British qualifications overseas that the government launched British Training International (BTI) in 1997. Although such moves have been criticised as much for selling, what some see as ‘flawed’ systems (Hyland, 1998), as for spreading ‘educational imperialism’ (Wilson, 1997), developing countries can and should still benefit from educational exports. Recipient countries should however, be assisted in exploring the full implications of implementation. Furthermore, exporting countries should ensure more research is carried out into the contextual and cultural factors that may affect implementation. Even before BTI was established, the DTI, who now work closely with BTI, did temper their ‘marketing of Britain’s qualifications’ brief with the following warning:

“There are however a number of pitfalls to trap the enthusiastic importers and exporters. Cost, suitability of the standards and lack of infrastructure for delivery, such as integrated education and training provision and high level of employer

involvement, often present the first set of problems.” (McGregor, DTI Newsletter No.4, 1995, p16)

Unfortunately, little emphasis was placed on potential cultural problems associated with exporting education. This research shows clearly that there are implications in relation to the implementation of competency-based training and student-centred learning in Bulgaria. This research has shown that some of these implications are clearly culturally related. This does not mean that we should cease to offer such ‘educational exports’, but we should be more ethical in our approaches to how we sell them. By working with interested foreign governments and the donor community to explore the implications in a more thorough way, recipient countries will benefit more. With benefits, of course, come costs. The costs associated with change may need to be anticipated, but not at the cost of in-action:

“...development is a process of change. The consequence of change will always be open to controversy since judgement of both ends and means involves values that will differ as a result of ideology, culture and the aspirations and responsibilities of those that express them...(Lewin, 1991 p1)

Even then there may be critics, but too much righteous hand wringing will simply delay even further helping developing and transitional countries to join the twenty-first century.

“Today education and training are the gateway into the global market which demands that adults continue a process of further learning throughout their life. Lifelong learning is the key concept for this way of life.” (Walters, 1997 p17)

It has already been pointed out in Chapter Three that the concept of lifelong learning is anything but new in Bulgaria, but in the rapidly changing world of education and training, all innovations need to be harnessed to effectively support such a concept.

Whilst it is difficult to predict the future of course, nevertheless decisions about the future need to be made. As far as VET reform in CEE, and Bulgaria particularly, is concerned, the decision makers need to have as much information, from all stakeholders, as possible to help inform their judgements. Baumgartl et al (1999) suggest the use of ‘scenarios’, or ‘stories about possible futures’ to act as supplementary tools to aid the decision makers and policy makers. However,

regarding education policymaking they urge caution in using such tools. The reasons stated simply reflect the author's findings about the conservatism present in the system:

"Are there 'objective' tools which allow for the reshaping of a system which is closely linked to national/regional history, tradition, culture, or mentality? Is creative thinking of use in a sector where continuity is cardinal to preserve people's identity? What are the constraints and opportunities of scenarios for the reform and upgrading of teaching and learning? (Baumgartl et al, 1999 p182)

In many ways, carrying out this research a little over two years after the end of the project may be seen as too soon, given the slow nature of reform. Certainly all the evidence suggests that educational reform does indeed take many years. However, given that no further evaluations have been undertaken since then, this work can make a valid contribution to the next evaluation, which is already planned.

"Even the most successful reforms inevitably produce considerable discontent. However, slow reforms, or no reforms at all, are bound to produce even greater dissatisfaction." (Balcerowicz, 2002 p53)

If slow, reform does create more dissatisfaction and problems, as the above author suggests, then maybe there is even more of a need to look seriously at what has happened so far and evaluate how best to move things forward, sooner rather than later. In the first half of 2003, the VET Department of the Ministry are to undertake just such an evaluation. The author has promised to make relevant findings of his research available in summary form. Although the research was not principally done to evaluate the project overall, some of these findings *will* be of use to the MES. It will be up to them to take on board all available information from this and previous evaluations in order to plan for the future. On a much wider international scale, there is some debate about whether such information is always available to assist and inform the decision makers:

"There is often repeated criticism that there are few documented examples of studies of educational change grounded in developing countries to use as a basis for formulating future policy. This is at best a half truth." (Lewin, 1991 p3)

The author would not be so bold as to suggest this particular study could contribute to the policy making of development agencies. However, as we have seen, as a study which contributes to the debate about exporting innovation and recognising the impact that culture can have on implementation, it adds further evidence to the debate. But a warning is noted by Cracknell, who identifies the possible futility of undertaking such studies or evaluations:

“There is little point of undertaking evaluations unless someone takes note of their findings and acts on them.” (Cracknell, 1984 p13)

So the question is, whether the Ministry is prepared to act on its acknowledgement of the issues:

“The implications for funding the necessary re-training and development are recognised.” (MES, 1999a, p21 par.7.3)

Just as the planners of development projects and the ‘exporters of innovation’ must take account of context and culture, equally, the relevant authorities and organisations in the recipient countries must look towards what is within their power to address. One of the priorities must be to improve the status of VET teachers. As the main implementers of change they are the key actors. This must be recognised and addressed. As De Grauwe (1998) identified, although teaching is not the most popular profession in the world, it is probably the most populated. Furthermore, out of the fifty-seven million teachers world-wide, two-thirds of these are in developing countries. Given the importance of the role of teachers in the developing world, of which countries in transition must be included, it is imperative to ensure that their status and security are assured. Only then can innovation, and in turn reform, start to work.

“To have a good chance of success, educational policies or innovations, whether initiated by national policy makers or by international organisations, need to be tuned to the everyday realities of the classroom and motivation and capabilities of ordinary teachers (Vulliamy et al., 1990 p17).

Throughout this work, the author has sought to identify factors, which may have impacted on the transfer of innovations in teaching and learning from one culture to another. Previous research suggests that there are a number of factors that can influence such transfer. Perhaps the most frequently cited factors revolve around teacher motivation (Diamond, 1991; Garrett, 1999; Griswold, 1994; Maruyama & Deno, 1992; Vulliamy et al., 1990). In this research, the author provides valuable additional weight to this view. However, the author has also identified a number of lesser-known factors that as far as this case study of transfer is concerned, are central to the transfer process. The teachers' overall role and status in the classroom, linked to their training and experience (or lack of) are seen here as a key factor in the successful implementation of the 'new' teaching and learning strategies.

The author has also identified a number of other factors, which indirectly, are impacting on the transfer of the wider programme. Parental choice of school and lack of relevant vocational progression are two such factors. The question of gender and role models are also raised as potentially important factors. Because of their potential significance, the author considers these factors warrant further research.

If one accepts that each culture is different with its own unique issues and problems (Brislin et al., 1973; Geertz, 1993; Nicolau & Manonelles, 2000), one might expect to identify factors unique to the Bulgarian context. Whilst there are certainly common factors present which support other work in the area, the combination of findings in this case study, as described above, in the author's opinion must be considered as unique, and as such, add to the theoretical understanding of the transfer of education in cross-cultural contexts.

In undertaking this research, the author believes he has satisfied the criteria outlined by the University for the award of a Doctorate. The work is both original and contributes to knowledge in the research area, as described above and in the opening paragraphs to Chapter Seven. It is a work of substance and scholarship as demonstrated by the depth (multiple research methods used and literature accessed) and breadth (range of schools and personnel contributing original data) of coverage contained in these pages, and time spent researching the topic, both in the UK and in

the field in Bulgaria. Finally, it contains work of publishable quality. Two publications have so far resulted from the work: Chapter Five in Muckle and Morgan (2001 pp73-91); and a paper delivered at the British Association of International and Comparative Education (BAICE) conference in 2002, the proceedings of which were subsequently published in CD format by BAICE (2003).

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