



BULGARIA BEYOND THE FACTS

Project Document

Brief Project Description

The project builds on a nine years old experience in establishing an Early Warning System and publishing regular Early Warning Reports in Bulgaria. Under the brand *Bulgaria Beyond the Facts* the project aims at publishing a series of issues papers that will examine critical problems and present analytical assessments of the prospects and barriers to human development in Bulgaria on the eve of its accession to the EU and during the first year of Bulgaria's EU membership. Nationally representative sociological surveys, coupled with public discussions and publication of three issues of *Bulgaria Beyond the Facts* on the theme of the surveys will represent the main outputs of the project. Its main objective is to influence the policy making process; to attract the interest and attention of expert audiences, public at large and media and to trigger public debate around critical issues challenging the human development in Bulgaria.

SIGNATURE PAGE

Country: Bulgaria

CP Outcome: Improved transparency, accountability and service delivery.

Expected Outcomes:

- ◆ Present valuable analysis and assessment of current social and economic development
- ◆ Advocating new concepts (development assistance, development cooperation, donor nation, partnership for development, human & social aspects of competitiveness of Bulgarian economy within the EU)

Expected Outcome Indicators:

Expected Outputs:

1. Three customized sociological surveys
2. Three public discussions/PR events
3. Three issues of Bulgaria Beyond the Facts print and on-line

Expected Output Indicators:

Implementing Partner: Foundation Gallup International Institute (FGII)

Programme Period:	2006 - 2009
Programme Component:	MYFF Goal 2: Fostering democratic governance
Project Title:	Bulgaria Beyond the Facts
Project Code:	53368
Project Duration:	Sept 2006 – Dec 2007

Total Project Budget:	99 000 USD
Allocated resources:	
UNDP TRAC	99 000 USD
In-kind contribution:	Gallup BBSS Intl; Foundation Gallup International Institute

Signature	Date	Name and Title
Agreed by the Ministry of Foreign Affairs:		
signed	10.10.2006	L.Kuytchukov, Deputy Minister
Agreed by the Implementing Partner:		
Foundation Gallup International Institute		
signed	2.10.2006	Kanchev Stoychev, Chairman
Agreed by UNDP:		
signed	4.10.2006	Neil Buhne, Resident Representative

SECTION I

I. 1. SITUATION ANALYSIS

Background

Bulgaria is close to its accession to the European Union. The final preparations to meet the expected criteria for EU membership are underway and no efforts are spared by government, public institutions and the society at large to achieve the national goal. Closing the 9-years old Early Warning System project at the end of March 2006, UNDP Bulgaria announced its plans for a series of issues papers under the brand *Bulgaria Beyond the Facts* to be published in 2006 and 2007. The main goal of the initiative is to examine hot issues and to make critical assessments of the prospects and barriers to human development in Bulgaria within the European Union. UNDP realizes that the new situation in an EU acceding country entails a specific type of monitoring, different from the EWR methodology. In the future the monitoring should be focused on the risks to growth and development within the framework of a largely stable economy and democratic institutions and the analyzes should assess the challenges Bulgaria will be faced with as a member of the EU. The price of EU membership, the competitiveness of the economy, the readiness to absorb the EU funds become important issues to be scrutinized and brought to public attention. In the future *Bulgaria Beyond the Facts* will aim at conducting special surveys and offer experts' analysis on issues of specific importance for Bulgaria in the last months of its preparations for EU membership and in the first months after accession.

I. 2. STRATEGY

The *Bulgaria Beyond the Facts* project is a natural continuation of the early warning methodology, which will focus on the production of a series of issues papers targeting specific audiences. The brand *Bulgaria Beyond the Facts* is already well known and recognised amongst expert audiences, media, international and business community in Bulgaria. The strategy of the project is to project the brand as advocacy platform and discussion forum.

Building on the experience in publishing regular Early Warning Reports and in working on their preparation with a certified partner – BBSS Gallup International for nearly nine years, UNDP Bulgaria wishes to expand this partnership. The project will seek the gradual approach of 1) offering for public discussion an issue/problem scrutinized in a respective 2) sociological survey, 3) triggering public debate and feedback from target audiences and 4) publicising the results of the surveys and discussions in a print and on-line format of *Bulgaria Beyond the Facts*.

The key objective of the project will be to seek influencing policy-making by formulating experts' opinions and recommendations on critical topics and issues in Bulgaria as an EU acceding country and in the nearest future - a new EU member state. The project will conduct three customized surveys targeting specific audiences, followed by public presentations & discussion of results (public/PR events). Publication of three issues of *Bulgaria Beyond the Facts* and publicizing the results of both the topical surveys and the discussions on the theme of the surveys will follow the public debates. Throughout the project's duration the existing EWR/*Bulgaria Beyond the Facts* web-site portal will be re-designed to reflect the goals and the specificity of the initiative; it will be also regularly up-dated and maintained in order to give access to the survey's data, analysis and reports.

2.1.Outcomes

The expected outcomes include:

- ✓ Presenting valuable analysis and assessment of current social and economic development and trends that could be forecasted;
- ✓ Advocating new concepts (development assistance, development cooperation, partnership for development, human & social vulnerability, the making and strengthening of the middle class in Bulgaria, the competitiveness of Bulgarian youth within the EU)

2.2.Outputs

The following outputs will be pursued in 2006-2007:

- ✓ Production of 3 *Bulgaria Beyond the Facts* issues (printed and on-line): 1 in 2006 and 2 in 2007, based on specific topical surveys;
- ✓ Up-dating and maintaining with possible re-design the web portal *Bulgaria Beyond the Facts* and up-loading regularly the new issues & surveys, questionnaires, summaries of public discussions. In line with the project's goals and more specifically with its main objective to influence the policy making process, unlimited access to the data and surveys' results will be given to key partners, namely to experts and senior level managers in the respective decision-making bodies such as ministries and governmental agencies.
- ✓ Three public outreach/PR events to present-discuss the surveys or the topical publications. The events will target specific audiences and will include – if necessary – institutional or media partnerships in order to ensure greater dissemination and impact of the surveys, analysis and assessments.

It is envisaged that three specialized sociological surveys will be conducted to track public perceptions and attitudes and to draw the attention of the experts' community and the public at large to some important issues related to Bulgaria's development as new EU member state. The tentative subjects (themes) and scope of the surveys are outlined below. To ensure up-to-date and relevant data and analysis on emerging problems and issues, the project partners and the executive team will be flexible in identifying – if need be during the project's duration – some new themes and sub-themes, and in re-formulating the surveys' titles, scopes and target groups. The project's partners will seek the opinion and comments and will coordinate the planning of the surveys with respective public institutions and governmental executing agencies.

The subjects, questionnaires, research tools, methodology and separate costing of surveys will be agreed upon between UNDP and the implementing partner in advance.

Theme 1: Attitude Towards Aid For Developing Countries And Countries in Transition, Sample size 1000, 18+, general population, nationally representative

The general objective of this study will be to investigate public awareness and general attitudes of Bulgarians on this subject, presumably quite new for them. There is available info on the subject for the EU member states, but no data was provided so far for Bulgaria as a candidate country and a prospect EU member in 2007. The questionnaire to be used will be in line with existing scope of indicators in the Eurobarometer study, monitoring the topic for the EU member states, to ensure international comparability of the data and analysis. The outputs of the study

could be used as a basis for development of advocacy platforms & public awareness rising campaigns.

Theme II: Economic Competitiveness And The Youth Of Bulgaria

The key objective of this study is to investigate attitudes and behaviour of the young Bulgarians with regard current and desired occupation/profession/career plans, educational & qualification prospects, internal and out of the country migration potential, civil & political attitudes, labour market related practices and views. Thus the key issue of short-and mid-term potential competitiveness of the Bulgarian economy will be addressed in its very important social and human aspects.

The planned sample size is of 1000 individual respondents nation wide, age 15-30 years, to be achieved via 3000 screening contacts of total adult population aged 18+.

The survey method is face to face individual interviews in-home.

Theme III: Socio-Economic Contrasts After Accession to the European Union (Survey of Middle Class in Bulgaria)

One of widely discussed issues related to the forthcoming EU membership of Bulgaria is the possible social & economic impact on the different strata of the Bulgarian society. The post-socialist transition period of the country in the last 15 years has resulted in a highly stratified by income & access to welfare society, whereby both the low-income and the emerging middle class strata face a variety of negative effects, related to social inequalities. Adaptation of Bulgaria to the EU common market environment, for example, is expected to increase levels of vulnerability for the small businesses in the country – which happen to be 90% of the companies in the private sector- with related social effects. Whether and how much would EU accession minimize or increase social inequalities in Bulgaria is one of the key issues for the policy makers. Bulgaria hopes to increase its competitiveness economically, which however will not be possible without keeping the social stability.

The proposed study, therefore, is targeted at describing, examining and analyzing how vulnerable are various economic activity groups at the initial stage of EU accession. The study will focus on difficulties & benefits experienced in the changing economic environment, political attitudes and personal life strategies included. The key questions to be answered include social stability & stratification trends, how vulnerable/ competitive are the different strata in the new situation, what an educated social policy, targeted at increasing social cohesion, should focus on.

The planned sample size is of 2000 respondents nation-wide (covering all income & social status groups, with a special focus however on the middle class occupation groups). The survey method is face to face individual interviews in-home.

3. PROJECT MANAGEMENT ARRANGEMENTS

Project Execution Modality

The Project will be NGO-executed. The Foundation Gallup International Institute (FGII) will act as the Project Implementing Partner. The FGII is a legal entity registered in Bulgaria under the Law on the Legal Persons with Non-Profit Purposes as an organization working for public benefit.

UNDP Bulgaria and the FGII will sign a Project Cooperation Agreement, which shall be an integral part of this Project Document. The Project Cooperation Agreement will detail the management, financial and reporting responsibilities of the FGII vis-à-vis the present project. (Annex 1).

Project Implementation Arrangements

The project will be managed and implemented according to the UNDP rules and procedures for NGO execution.

The FGII will manage the implementation of the project and will be fully responsible for the attainment of the planned project Outputs as per the Project Results and Resources Framework Section II of the Project Document (below). Key activities will include: conducting national representative surveys on agreed topics, organizing public discussion forums, publishing print and on-line *Bulgaria Beyond the Facts* issues papers.

The FGII will be responsible for the effective, efficient and timely implementation of the project activities as per the approved project work plans. It will observe the relevant UNDP rules and procedures for project implementation.

The executive team at Foundation Gallup International Institute will consist of:

- ✓ Project Manager
- ✓ Editor-in-chief (for the printed editions)
- ✓ Administrative manager
- ✓ PR Manager

Senior research analysis team (both internal and external) will be sub-contracted for the project.

Financial Arrangements

The management of the project's funds, including budget revisions, disbursements, record keeping, accounting, reporting, auditing, will observe the UNDP rules and procedures in force. Disbursements will be effected at the request of the Project Manager through UNDP as direct payments. Procurement of goods and services including identification, selection and contracting of consultants and sub-contractors will follow the Bulgarian legislation.

For the operations implemented through direct payment, FGII will be responsible for planning, contracting, financial and reporting activities, including but not limited to:

- update of the overall and yearly project work plans as necessary;
- project record-keeping;
- procurement of goods and services including identification, selection, contracting of and liaison with consultants and sub-contractors;
- monitoring and coordination of sub-contracted assignments;

UNDP Country Office Support Services to Project Execution and Implementation

The UNDP Country Office will provide to FGII the following types of support services for the execution and implementation of the project, whenever necessary:

- management assistance / advice in relation to the project activities that are performed including but not limited to observance of the project work plan
- assistance in liaising with national partners;
- assistance for public advocacy purposes;
- project supervision for accountability, transparency, effectiveness and efficiency;
- project monitoring and evaluation;
- processing of direct payments;

An amount of UNDP's contribution to the project budget will be utilized for reimbursement of the implementation support costs related to the country office support to NGO execution in accordance with UNDP policy on cost recovery.

Project Budget Inputs and Funding Sources

The total budget of the project will be USD 99 000, of which USD 99 000 will be provided by UNDP TRAC.

FGII will provide in kind contribution consisting of:

- provision of office space for the Executive team;
- sharing (and comparing) data gathered through research activities of FGII on issues related to Bulgaria Beyond the Facts surveys;
- usage of printing facilities;

Partnership Principle

To achieve the project objectives Foundation Gallup International Institute and BBSS Gallup International shall be guided by the Partnership Principle under which FGII assumes the role of an equal partner under the project.

Risk Management

Possible risks during the implementation of the project that could affect its outputs and final impact relate to some delays in conducting, processing and publishing the data. Other risks could imply the relevance of the proposed topics for the surveys. To address the "relevance and adequacy" question, the executive team, and UNDP and FGII representatives will carefully assess the validity and the importance of the surveys' themes and topics and the profile of the public events to present the results of the surveys.

While there are no major risks that could jeopardise the smooth implementation of the project, the project partners will remain in close contact to consider the widest possible impact of the in-depth study (survey, event, publication) of particular issues and will be flexible to realign the project's positioning in order to minimise the risks and respond to public expectations.

5. MONITORING AND EVALUATION

The project will be monitored and evaluated according to UNDP's monitoring and evaluation rules and procedures. UNDP's reporting formats will be used. The Project Manager will prepare annual project work plan. The execution of the plan will be monitored by UNDP and the Foundation Gallup International Institute. The Project Manager will also submit to UNDP final project report.

The project may be subject to independent evaluations as per UNDP's Evaluations and Tracking Plan currently in force. The project will be audited at least once during its life-time as per the applicable UNDP audit plan.

Project coordination

Project revisions that involve changes to project goal, or substantial modification of project outputs and activities, will be agreed in writing by all partners either by calling an ad hoc session, or by collecting (including through email) written opinions of all partners.

6. LEGAL CONTEXT

The Standard Basic Assistance Agreement, which is a pre-requisite for UNDP programme support, was signed between the Bulgarian Government and UNDP on 20 August 1992. This project shall be implemented in accordance with the provisions of the Standard Basic Assistance Agreement and its Additional Protocol as ratified by the Bulgarian National Assembly. This project document shall be the instrument referred to as such in Article 1 of the Agreement. The host country Implementing Partner shall, for the purpose of the Agreement, refer to the government co-operating agency described in it.

The following types of revisions of this Project Document may be effected with the signature of the UNDP Resident Representative only, provided that he/she has been assured that the other signatories of the Project Document have no objections to the proposed changes:

- revisions in, or additions to, any of the annexes of the Project Document;
- revisions which do not involve significant changes in the goals, outputs or activities of the project, but are caused by the re-arrangement of inputs already agreed to, or by cost increases due to inflation;
- mandatory annual revisions which rephrase the delivery of agreed upon project inputs into subsequent years, or reflect increased expert or other costs due to inflation, or take into account agency expenditure flexibility.

7. DURATION

The Project shall commence in September 2006, upon signature by all parties, and terminate on 31 December 2007.

SECTION II – Results and Resources Framework

Results and Resources Framework **Table 1**

SECTION III – Project Work-plan and Budget

Project Work-Plan and Budget **Table 2**

PROJECT RESULTS AND RESOURCES FRAMEWORK

Intended Outcome as stated in the MYFF (CP) – Improved transparency, accountability and service delivery			
Outcome indicator as stated in the MYFF:			
Target 2006:			
Applicable MYFF Service Line: Policy support for democratic governance			
Partnership Strategy: Foundation Gallup International Institute and BBSS Gallup International, guided by the Partnership Principle, assumes the role of equal partners under the project; the project seeks the participation of all relevant stakeholders in presenting the issues papers and ensuring policy impact			
Project title and ID: Bulgaria Beyond the Facts			
Intended Outputs	Output Targets for 2006/2007	Indicative Activities	Inputs
Output 1 Management	Output target Creating Executive Team a) Project Manager a) Editor-in-chief b) Administrative manager c) PR manager Achievement date: September 2006	<ul style="list-style-type: none"> • Activity 1.1 Responsible for organizing and monitoring the work of the whole project – the overall process • Achievement date: Throughout the project • Activity 1.2 Meeting with UNDP and Bulgaria Beyond the Facts Executive Team & FGIIntl and BBSS Gallup Intl Senior management to agree on profile and tasks of the project, approve project strategy and work plan • Achievement date: September 2006 • Activity 1.3. Operational Executive team and utilities <li style="padding-left: 20px;">Achievement date: Throughout the project 	Local consultants Office utilities Administrative supplies Miscellaneous expenses Total 10000 USD
Output 2 Specialized sociological surveys	Output target First survey – “Attitude Towards Aid For Developing Countries And	<ul style="list-style-type: none"> • Activity 2.1 Study design & questionnaire preparation • Achievement date: September – 1st 	Local consultants Contractual Services companies

	<p>Countries in Transition”</p> <ul style="list-style-type: none"> • Achievement date: September-October 2006 <p>Output target Second survey – “Competitiveness and the Youth of Bulgaria”</p> <ul style="list-style-type: none"> • Achievement date: April 2007 <p>Output target Third survey – “Socio-economic Contrasts After Accession to EU (Survey Of Middle Class in Bulgaria)”</p> <ul style="list-style-type: none"> • Achievement date: June 2007 	<p>survey; March 2007 – 2nd survey; May 2007 – 3rd survey</p> <ul style="list-style-type: none"> • Activity 2.2 Fieldwork • Achievement date: September 2006 – 1st survey; April 2007 – 2nd survey; June 2007 – 3rd survey • Activity 2.3: Data processing • Achievement date: September –October 2006 – 1st survey; April 2007 – 2nd survey; June/ July 2007 – 3rd survey • Activity 2.4. Analysis & Editing & Data reports • Achievement date: October 2006 – 1st survey; May 2007 – 2nd survey; July /August 2007 – 3rd survey 	<p>Miscellaneous Expenses Travel</p> <p>Total 58 000 USD</p>
<p>Output 3 Web-site re-design, update and maintenance; online publications</p>	<p>Output target: Preparing amendments to the current portal</p> <p>Achievement date: September 2006</p> <p>Output target: Publicising the results of the surveys and discussions</p> <p>Achievement date: October –</p>	<ul style="list-style-type: none"> • Activity 3.1 Web IT outlook re- design (existing data and archive) • Achievement date: September-October 2006 • Activity 3.2 Launch of changed website • Achievement date: October 2006 	<p>Local consultants Contractual Services companies Miscellaneous Expenses Printing and Publications</p> <p>Total 5000 USD</p>

	November 2006 – 1 st survey and PR event; May 2007 – 2 nd survey and PR event; September 2007 – 3 rd survey and PR event	<ul style="list-style-type: none"> • Activity 3.3 Publicising the results of the surveys and discussions • Achievement date: October –November 2006 – 1st event; June 2007 – 2nd event; September 2007 – 3rd event 	
Output 4 Printed editions, public outreach and & PR activities	<p>Output target: Press conferences Achievement date: October 2006 – 1st PR event; May 2007 – 2nd PR event; July 2007 – 3rd PR event</p> <p>Output target: Public discussions Achievement date: October 2006 – 1st PR event; May 2007 – 2nd PR event; September 2007 – 3rd PR event</p> <p>Output target: Printed issues or Bulgaria Beyond the Facts Achievement date: November 2006 – 1st issue; June 2007 – 2nd issue; early October 2007 – 3rd issue</p>	<ul style="list-style-type: none"> • Activity 4.1 Administrative organizing PR events • Achievement date: September 2006 – 1st PR event; April 2007 – 2nd PR event; June 2007 – 3rd PR event • Activity 4.2 Meetings for invitations of experts to the discussions Achievement date: September 2006 – 1st PR event; May 2007 – 2nd PR event; August 2007 – 3rd PR event • Activity 4.3 Meetings to create media (and institutional – if necessary) partnerships • Achievement date: September 2006 – 1st PR event; May 2007 – 2nd PR event; August 2007 – 3rd PR event • Activity 4.4 Press releases in English and Bulgarian • Achievement date: October 2006 – 1st 	<p>Local Consultants Contractual Services companies Printing and publications Miscellaneous Expenses</p> <p>Total 26 000 USD</p>

		<p>PR event; May 2007 – 2nd PR event; September 2007 – 3rd PR event</p> <ul style="list-style-type: none"> • Activity 4.5. Press conferences/ PR events • Achievement date: October 2006 – 1st PR event; May 2007 – 2nd PR event; September 2007 – 3rd PR event • Activity 4.6. Discussions • Achievement date – October 2006 – 1st event; May 2007 – 2nd event; September 2007 – 3rd event • Activity 4.7. Printing issues of Bulgaria Beyond the Facts Achievement date – November 2006 – 1st issue; June 2007 – 2nd issue; early October 2007 – 3rd issue 	
Output 5. Monitoring and evaluation	Output target:	<ul style="list-style-type: none"> • Activity 5.1. Regular monitoring reports produced • Achievement date: quarterly • Activity 5.2 Beyond the Facts Executive Team & BBSS Gallup International Senior management meetings held Achievement date: quarterly 	
Total Budget: BGN 152 040 /US \$ 99 000			

