

## SOCIAL SERVICES HELPDESK ON EU FUNDS



### Managing Authorities: Survey Analysis Report

### Bulgaria

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**Date:** 06/10/2022

**Version:** 0.1

Dissemination Level	
Restricted	
Public	X

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## 1. INTRODUCTION

*“The access and use of ESF+ and ERDF by social services<sup>1</sup> – Managing Authorities’ perspective and feedback”* survey was completed in the framework of the “Social Services Helpdesk on EU Funds” project.

Through this survey, the project’s consortium aims to better understand the needs, opportunities, and challenges related to the use of ESF+ and ERDF funds by social services in different EU Member States. Hence, managing authorities and authorities responsible for the coordination and design of social services were invited to reflect on the design and implementation of ESF(+) / ERDF Operational Programs in respective national systems of EU funding. This will assist to further identification of the leverages that exist to facilitate social services’ access to these funds. Finally, the expressed opinions will form the base on which the tailored activities to support, guide, and facilitate successful participation of social services in ESF+ and ERDF funding programs will be developed.

## 2. ANALYSIS AND REPORTING METHODOLOGY

Survey was developed in the frame of the project “Social services helpdesk for EU funding”, under the task 2.2. It provided sets of questions for two groups of respondents:

- 1. representatives of social service providers and public authorities in charge of design and coordination of social services on local/ regional/ national level**
- 2. representatives of national, sectoral, or regional managing authorities (or corresponding bodies in the EU funding cascade of the shared management).**

At the Steering Committee meeting, the Consortium decided to prepare national reports of EU member states for which representatives of ESF+/ERDF management bodies provide 5 or more responses, taking into account that a sample lower than this could hinder participation bias, thus being non-representative. This target was achieved for 5 EU member states – Bulgaria, Czech Republic, Greece, Poland, and Spain.

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<sup>1</sup> A social services provider is any organisation whose main activity falls under Eurostat’s statistical classification of economic activities (NACE codes 87 and 88). For example, social services include, but are not limited to the following activities: residential care with or without accommodation, including services for the elderly and disabled, temporary shelter for the homeless, refugees, childcare, and vocational training for the unemployed among others. Social services can be either public or private and can have a broader or a more restrictive definition in each Member State.

Respectively, this report consolidates the analysis of responses given by the **representatives of Bulgarian national, sectoral, or regional managing authorities** (or corresponding bodies in the EU funding cascade of the shared management).

Types of questions used in the survey were decided by the consortium respectively as:

1. Multiple choice questions;
2. Rating scale questions;
3. Open-ended questions.

Actual questions of the survey were agreed upon by the coordination of the Work package 2, task 2.2, namely European Association of Service providers for Persons with Disabilities (EASPD), European Social Network (ESN), Social Services Europe (SSE), European Ageing Network (EAN), Union des entreprises à profit social (UNIPSO), and Asociace Poskytovatelů Sociálních Služeb České Republiky (APSS).

Survey “*The access and use of ESF+ and ERDF by social services – Managing Authorities’ perspective and feedback*” was launched on the [Jotform](#) online tool (external expert support was used to technically support the upload of the survey onto the platform) on the 28/09/2022 and was promoted via link with the cut-off date to receive the answers 15/10/2022.

Distribution of survey was done on two levels:

1. By **project consortium** (respectively 17 organisations: European Association of Service providers for Persons with Disabilities (EASPD), European Social Network (ESN), Social Services Europe (SSE), European Ageing Network (EAN), Caritas Europa, Eurodiaconia, Federation of European Social Employers, European Network of Social Integration Enterprises (ENSIE), European Platform for Rehabilitation (EPR), Fédération Européenne des Associations Nationales Travaillant avec les Sans-Abri (FEANTSA), Union des entreprises à profit social (UNIPSO), Comité Européen des Associations d'intérêt général (CEDAG), Asociace Poskytovatelů Sociálních Služeb České Republiky (APSS), Fundación Once para la Cooperación e Inclusión Social de Personas con Discapacidad (FONCE), Consorzio Nazionale Idee in Rete (IIR), Hubbie) among their membership as the organic reach (members) and additional efforts (corresponding contacts, partners, etc.) invested;
2. By the **consortium’s membership, networks, partners, and collaborators** (including the European Commission representatives).

Dissemination of the survey link and QR code by the above-mentioned actors was executed using following means:

- **E-mail:** sent by the consortium using the template email text with the adjustment possibility;
- **Newsletter:** number of consortium members are producing regular – weekly, monthly, newsletter shared via email with their membership and registered receivers;
- **Social network posts:** post including picture, short description and the survey link were shared as posts on LinkedIn and Twitter accounts of consortium members
- **Website content:** consortium members prepared and published web articles to promote the survey to website visitors

As consortium established the tracking of their efforts to contact the managing bodies in the EU members states, 780 individual contacts were established via email and 77 in total in Bulgaria.

### 3. EU FUNDING CONTEXT (2021-2027) IN BULGARIA

Under its partnership agreement with the European Commission, Bulgaria will implement ESF+ via three national programmes.

#### 1. Sustainable employment and social inclusion

With an overall budget of almost €2 billion (ESF+ and national co-funding), the Human Resources Development Programme will contribute to better employment opportunities, upskilling and re-skilling of the population, and social inclusion. More than €1.28 billion will be invested in measures that reinforce the national labour market, with special focus on young people, helping more individuals to gain and improve qualifications, providing targeted support for job creation, promoting entrepreneurship and social economy. The programme will also focus on preparing the labour market for the digital and green transitions, with expanded access to training courses and employment opportunities. More than €700 million (ESF+ and national co-funding) will support social inclusion of the most vulnerable groups, including provision of better social services to the elderly and people with disabilities, reducing child poverty and better socio-economic integration of marginalised groups, including Roma. Overall, the programme will reach more than 740 000 participants.

#### 2. Modernising the education system

Under the ESF+ programme Education, nearly €1 billion (ESF+ and national co-funding) will help to improve the quality of education, focusing on digital educational content and boosting the level of digital skills of pedagogical specialists, students and parents. The programme will invest in modernising the education system at all levels of education

– including vocational and higher education – to ensure alignment with the future labour-market needs. It prioritises equal access of all children to quality education, starting from the pre-school level, and dedicates €100 million to tackling child poverty and reducing school drop-out. Overall the programme will support more than 760 000 children and students.

### **3. Reaching the most vulnerable**

Finally, the Food and Basic Material Support Programme will tackle material deprivation of the most vulnerable population in the country, complementing the national policy to mitigate and reduce poverty and overcome social exclusion, with a strong focus on children. With more than €200 million (ESF+ and national co-funding), the programme will offer packages of food and hygiene materials, packages for new-born children, vouchers for baby/children meals and warm lunches to society’s most vulnerable – including those in remote areas. Over 600,000 people will receive support under the Food and Basic Material Support Programme 2021-2027.

With a total of €2.6 billion in ESF+ (€3.14 billion with national co-funding) – an increase of over 60% compared to the amount invested under the ESF and FEAD in 2014-2020 – the financial allocations will ensure the country is able to face future economic and social pressure, while reaching society’s most vulnerable people.

*As a complement to this information, the Helpdesk website provides further information about the architecture and the state of play of shared management funds in each EU member State, with a focus on ERDF and ESF+.*

## **4. QUANTITATIVE & QUALITATIVE DATA ANALYSIS**

### **4.1 PART A: PROFILE OF RESPONDENTS**

In total **7 responses** were received in the frame of the survey from representatives of Bulgarian national, sectoral, or regional managing authorities (or corresponding bodies in the EU funding cascade of the shared management).

Respondents were, for the purpose of their identification, requested to share the name of the operational programme they represent. From received responses, following distribution can be concluded:

- 7 respondents were representing national level authority;
- Regarding their positions, 2 persons acted as middle level managers, 3 persons acted as chief experts (implementation officers), 1 as state expert and 1 as officer;

- ERDF managing structure was represented by 3 respondents and ESF(+) by 4 respondents;
- operational programmes represented by respondents were as follows:
  - Regions in Growth 2014-2020, Development of Regions 2021-2027 (ERDF)
  - Programme for food and basic material assistance (ESF+)

## **4.2 PART B: ASSESSMENT OF THE ESF+ AND ERDF OPERATIONAL PROGRAMS' RELEVANCE FOR SOCIAL SERVICES**

The objective of this survey section was to define a set of questions determining the view of respondents on the frequency and quality of involvement of social service providers (and corresponding actors) in EU funding under shared management in Bulgaria, mainly focusing on ESF(+) / ERDF Bulgarian experience. Regarding the quality of involvement of social service providers as project beneficiaries, several questions allowed for respondents reflect on their satisfaction level and perceived challenges in the process of EU funding allocation, as well as assessing their internal capacity and ambitions for improvements.

### **Participation of social service providers in the EU funding programmes managed by the Bulgarian managing authorities**

In order to establish the relevance of the individual respondent for the purpose of this survey, the respondents were asked to reflect on the involvement of social service providers in the EU operational programme as project beneficiaries.

Out of seven received answers, one (14%) respondent declared that social service actors were not beneficiaries of the operational programmes they are representing. Most (4 or 57%) respondents declared that social service actors are somewhat active in mobilising EU funds, and additional two (29%) declared that those actors can be considered as very active in mobilising EU funds.

### **Satisfaction with the efficiency of allocation of EU funds (ESF+ / ERDF) to social services**

Self-assessment of respondents for their satisfaction level with efficiency of the Operational programmes (ESF+/ERDF) to implement allocation of funds resulted with satisfying results, 5 (72%) answers rating this segment as "good" (3 or 43%) or "rather good" (2 or 29%); while one answers each (14%) were given for "I don't know" and "rather weak".

### **Thematic priorities used by social services ESF+ / ERDF**

To establish what thematic focus was given to projects proposals submitted by social services actors in the frame of Bulgarian ESF(+) and ERDF, respondents were given the option to provide their answer in the open (textual) format. Analysis of answers gave the overview of key words (phrases) used as follows:

- Affordable services
- Social inclusion
- Socio-economic integration
- Development of infrastructure (refurbishment and reconstruction) in relation to social service provision
- Consultations of end users (health, employment)
- Childcare
- Basic material support and distribution

### **Challenges of ESF+/ERDF management authorities when funding social services**

Asked to assess comparatively their perception of challenge when faced with proposed phases of operational programme (ESF+/ ERDF) planning and implementation, respondents were able to select one option as “the most challenging”. Planning phase was the most commonly chosen option (54% of respondents), where 3 respondents (27%) rated “setting priorities and allocating funds” and the same number of respondents rated “consultations and involvement of relevant stakeholders” as most challenging part of Programme management. Implementation phase was rated as most challenging by 3 respondents (27%) – each choosing different segment: defining the “rules” for applicants, assessment and project selection and monitoring, assistance to the project implementation, performance assessment and reporting. Respondents were given the option to provide their own option (textual entry) as answer and two of them seized this opportunity stating that “*Providers of social services were not beneficiaries in the implementation of the Operational Program "Regions in Growth" 2014-2020*”.

### **Outsourcing as an option to cover missing capacities and raise the quality of procedures?**

To assess the past and current capacity of managing bodies to find solutions for perceived challenges in operational programme management, the respondents were able to provide their answer to the question about outsourcing of services covering parts or entire programme planning or implementation process. All received answers (6) reflected the complete ownership of programme management process without involvement of the expertise of external actors.



## **Main leverages at disposal to managing authorities to overcome challenges**

Respondents were given the option to elaborate their opinion on the leverages that they can use in their work to overcome the changes marked as the most significant. Knowledge of those indicates the existence of capacity for solutions within the managing bodies of operational programmes (ESF+/ ERDF).

Below the solutions proposed by five of the respondents (one stated that social services actors were not beneficiaries of their operational programme):

- Good needs analysis;
- Well-coordinated mechanism (informal meetings, etc.) for consultations with relevant stakeholders (thematic experts and non-government organisations) in the preparation and implementation phase;
- Good communication with policy makers.

## **Involvement of intermediate bodies and assessment of their performance**

In order to divide the responsibility and involve more competent public authority into the allocation of EU funds to social services, managing authorities sometimes entitle secondary (intermediary) level of programme management. This is a way for managing authorities to close the gap in their capacity to serve the specific group of beneficiaries. Five respondents provided negative answer.

## **Assessment of the current state of simplifications implemented**

The Common Provisions Regulation for the financial period 2021-2027, after a comprehensive consultation, stipulates the obligation or possibility for Operational Programmes to use several simplifications for the implementation of the national ESF+ and ERDF Operational Programmes. Therefore, respondents were asked to assess the application those simplifications in their Operational Programmes.

Out of 7 responses to this question, 4 (57%) respondents rated their Programme as “good” or “rather good” while 3 (43%) responded with “I don’t know”.

Asked to comment their answer, two respondents justified their lack of capacity to give an informed answer and one stated that national legislation does not leave space for further simplification to their operational programme. One of the respondents mentioned the use of simplified cost options by their programme as the most significant simplification.

## **Preferences among simplifications**

Asked to express preferences of simplifications at their disposal, related to the Common Provisions Regulation , 6 respondents provided answers, out of which three state simplified cost options as the most significant type of simplification. The other three

respondents expressed their inability to decide, or lack of relevancy of the question for the position they obtain. Such distribution of answers allows the conclusion that efforts invested in development of simplified cost options on the side of the European Commission is appreciated by the national and regional managing bodies.

#### **Operational interventions to improve efficiency of EU funding for social services**

Regardless of the Common Provisions Regulation (Regulation (EU) 2021/1060), EU Member States can establish procedures to close the gap between the required or planned quality of management and administration (e.g. complementary administration procedures and reporting to achieve better transparency, etc.) tasks and current state of capacity. Outsourcing of different services could add value, in short term, in described situations. Survey respondents were asked to list such efforts in their operational programmes, in case implemented in the 2014-2020 financial period of planned efforts for the 2021-2027 period. Five respondents offered their answers, out of which four expressed the inability to decide or to provide answer due to their lack of knowledge. One respondent expressed the plan of the operational programme to introduce the “evaluation of effectiveness, efficiency and added value of the Programme” at the mid-term of the financial period.

### **4.3 PART C: ASSESSMENT OF THE SOCIAL SERVICES CAPACITY TO MOBILISE ESF+ AND ERDF FUNDS**

With regards to the ESF+ and ERDF operational programme, managing authorities were given the opportunity to express their perception on the capacity of programme beneficiaries to comply with programme requirements. The intention of the consortium is to compare these assessments with self-assessments in the same segments given by the social service providers acting as beneficiaries in the national/regional ESF+ and ERDF financing structures.

#### **Readiness of project applicants to write and implement EU projects**

Asked to rate the current readiness of project applicants to prepare and implement projects in the frame of the national / regional ESF+ and ERDF, out of 7 respondents, 6 (86%) rated the readiness of applicants as “good” (3 or 43%) or “rather good” (3 or 43%)., while 1 respondent was not certain, chose “I can’t tell/I don’t know”. The answers provided suggest the experience of existing (past) applicants in the operational programme in question. A further question which might arise from the result given, –is whether there is an anticipated need, or enough efforts invested, to make the operational programme attractive to new (different) potential beneficiaries.

### **Internal factors as guarantee for the successful implementation of EU projects**

Respondents were asked to give their perception on the important internal factors to guarantee the success of social service providers implementing their EU-funded projects. Eight respondents provided the following most significant:

- Financial capacity: solid financial management and available cash flow
- Institutional capacity: dedicated staff for EU funding programmes
- Experience in using EU funds (skills, knowledge, and the right people)
- Good network and knowledge of available opportunities for the sector

### **Recurring problems faced by project applicants and managers**

Representatives of ESF+ and ERDF Bulgarian national management bodies were asked to list the most recurring problem which in their opinion project applicants and managers face during project application and project implementation phase.

Out of 5 provided answers, 3 respondents expressed that they do not work in close collaboration with project applicants and managers and are thus unable to provide answer. One respondent implied that implementation of the good monitoring system (IMIS) deducted largely the number of mistakes Programme staff was previously facing. One respondent chose to elaborate their perception which paraphrased state as follows:

- Inappropriate timeframe set in the project applications for the activities planned;
- Insufficient financial liquidity of projects derived from the inappropriate timeframe of activities and aligned payment forecasts (which do not enable a budget turnover in case of delays and lack of co-funding);
- Difficulties of project beneficiaries to recruit experienced and skilled staff for project management.