

# **The Young Generation and Next Europe**



**Prof. Marin Drinov Publishing House  
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BULGARIAN ACADEMY OF SCIENCES  
INSTITUTE OF PHILOSOPHY AND SOCIOLOGY

# **The Young Generation and Next Europe**

**Rumiana Jeleva**  
**Editor**

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**Rumiana Jeleva**

## Towards a New Interdisciplinary Approach to Studying Europe and the EU<sup>1</sup>

Several major developments in the world today are challenging the future of Europe and the European Union (EU).

First and foremost, mankind is witnessing *geopolitical shifts and increasing geopolitical competition*. Russia's invasion of Ukraine violates Article 2(4) of the UN Charter<sup>2</sup>, thereby defying the international legal order. The rise of new economic and political powers – China, India, Brazil, South Africa - are changing the global balance of power. Other countries, like Turkey, Indonesia, and Mexico, which are often qualified as emerging powers, are becoming, at the least, powerful regional players. It is important to note that the rise of new powers is a dynamic process, and their relative strength and influence may fluctuate over time depending on various economic, political, and strategic factors. All these developments have implications for the foreign policy, trade relations, and the overall global role of the European Union.

There are obviously significant *security issues* the EU must deal with. The Russian invasion of Ukraine, the geopolitical instability in the Union's immediate neighborhood, are recent concerns added to the old and continuing risk of global terrorism and cyber threat. To confront these issues, EU member states are cooperating on security and defense issues as never before. However, *EU's defence capabilities* have yet to advance and grow in a common direction and with a common infrastructure. *Migration and refugee crises* are a persistent issue for EU member states and Europe as a whole. The significant influx of migrants and refugees in recent years has raised questions about borders, national identity, and social cohesion. *Climate change and environmental sustainability* have obviously become a key global topic for the first time in human history. The EU is grappling with the impact of climate change and working for a transition to a more sustainable economy through policies aimed at reducing greenhouse gas emissions, promoting renewable energy, and improving resource efficiency. Last but not least, *digital transformation*

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<sup>1</sup> The topics and reflections in this section are inspired by the COST Action "EU Foreign Policy Facing New Realities: Perceptions, Contestation, Communication and Relations", in which the author participated for several years. I would like to thank the leaders of its Working Group 1 Knud Erik Jørgensen (Aarhus University, Denmark) and Feride Aslı Ergül Jørgensen (Ege University, Turkey) for the excellent cooperation they provided and for organizing a special seminar devoted to the impact of global changes and megatrends on Europe and the EU, and to the methods of studying European affairs and EU foreign policy.

<sup>2</sup> The charter that requires UN member states to refrain from the "use of force against the territorial integrity or political independence of any state."



*is all around us*<sup>3</sup>. The EU is navigating the rapidly changing landscape of digital technology, which offers new opportunities but also new problems in areas such as data protection, cybersecurity, the impact of automation on jobs, businesses, labor markets and society. All these overarching changes in the world raise complex and interconnected issues for the EU, highlighting the need for innovative and forward-looking policies and strategies to address them.

In such a changing global context, how are we to study and form a consistent picture of the issues facing the EU and Europe? Do we need new research approaches for the purpose? And what kind would be suited to the purpose?

The starting point for the new research approaches we are looking for is awareness of the evolving nature of the European Union, its evolving role in the rapidly changing global context. This situation would require a shift in focus from the traditional one, which sees the EU primarily as a product of intergovernmental negotiations, to a perspective that recognizes the growing importance of *non-state actors, transnational networks, digital technologies and local and regional contexts* in shaping the policies and politics of the Union. Reliable research approaches to the EU and Europe should recognize that the EU operates in a complex and dynamic environment; we should also have a nuanced understanding of the Union's internal workings, power settings, and its relations with external actors and institutions. The new research approaches we are looking for entail the need for interdisciplinary knowledge and scientific experience, for insights coming from a range of sciences such as political science, economics, sociology, political philosophy and law. Specialized literature offers suggestions for new, alternative and innovative perspectives (Jørgensen et.al, 2015; Wallace, Pollack et. al, 2020; Jørgensen and Ergul Jørgensen, 2020), which we can designate for the purposes of this article by a common term – “new interdisciplinary approach”.

### **The New Interdisciplinary Approach to studying Europe and the EU**

As we said above, a new interdisciplinary approach to research on Europe and the EU should combine insights and methods from various fields such as sociology, political science, political philosophy, economics, cultural studies, etc. It would require breaking down traditional boundaries between disciplines and adopting a more holistic and multifaceted perspective on the complex challenges facing Europe and the EU today. The interdisciplinary approach, as applied by the authors of this publication, could involve examining the historical and cultural roots of European integration,

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<sup>3</sup> This quotation is taken from a focus group discussion held under the project „Digital divide and social inequalities: levels, actors and interactions“ (№ KII-06 ПН55/7). In these words, the participants, who were industrial production workers, described the level of technological progress in their company. I place the quote to underline the importance of the digital transformation for Europe's future.

analyzing the social and economic impacts of EU policies on various phenomena and communities, exploring the role of the media, digital technologies and communication in shaping public perceptions and debates about the EU, using data-driven methods to study the political and institutional dynamics of the EU, etc. In this manner, the approach would provide a more comprehensive and nuanced understanding of the multiple factors that shape the object of research, and new knowledge about and solutions to the complex challenges to Europe in the 21st century.

The approach in question could be theoretically grounded in various ways, depending on the specific research focus and questions being addressed. Some possible theoretical frameworks are those provided by systems theory, actor-network theory, critical theory, among others. The *system theory* perspective views complex phenomena as composed of multiple interrelated parts or subsystems that interact and influence each other. In applying systems theory to our object of study, research would focus on the various political, economic, social, and cultural systems that constitute Europe, and their interconnections. When applying *actor-network* theory, we would analyze the various actors and entities involved in the region's governance, such as EU institutions, member states, corporations, and civil society organizations, as well as the material and technological infrastructures that support them. *Critical theory* emphasizes the importance of power, inequality, and social justice when analyzing social phenomena. Applied to the study of Europe and the EU, this approach would suggest examining how power is distributed across countries and regions, the impact of EU policies on marginalized groups, and the ways in which social movements and civil society organizations are working to challenge dominant power structures.

With regard to methodology, the interdisciplinary study of the EU and Europe should be embedded in a variety of social science tools and instruments, ranging from quantitative surveys and big data analysis to qualitative and microsocial techniques (such as those proposed by ethnographical and anthropological research or (auto) biographical interviews and memoirs).

Based on these considerations, I believe the new interdisciplinary approach can be seen as related to Robert Merton's concept of "middle range theory" as opposed to grand theory, with his strong orientation to empirical research. His work on the sociology of science in conjunction with his ideas about the middle-range approach can be considered relevant to the interdisciplinary perspective we are discussing here. In his most famous work, *Social Theory and Social Structure* (1968: 61ff), Merton presented his ideas about the role of theory in sociology and the usefulness of middle-range theorizing for bridging the gap between abstract grand theory and empirical research. He argued that a middle-range theoretical framework should be applied to specific empirical data about specific social phenomena, in order to make a reliable connection between general theorizing and concrete observations<sup>4</sup>.

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<sup>4</sup> R.K. Merton (1957) wrote: "By 'intermediate-range theory' I mean any effort to link sociological theory and empirical observation more closely by more precisely specifying the domains of empirical generalization, usually with respect to limited varieties of situations and

This could be useful in studying complex issues (such, in our case, are the issues facing Europe and the EU today). In the case of sociology of knowledge, Merton argues that such theorizing would be sensitive to the social and cultural factors that apply to scientific knowledge and the scientific community. Thus, in highlighting the importance of ideas, principles, guiding values, etc., for politics, Merton's concept helps us understand how interdisciplinary collaboration could also be applied to the research of Europe and the EU, providing there is a sound empirical basis for this study<sup>5</sup>. This approach allows for more precise empirical testing and facilitates the formulation of specific policy recommendations. In considering a new interdisciplinary approach to the study of Europe and the EU, we can see how digitalization can play an important role. The use of digital technologies produces a growing amount of data that can be analyzed using various methods and tools borrowed from different disciplines. For example, social media data can be analyzed to understand public opinion and political discourse in the EU, while machine-learning algorithms can be applied to identify patterns and trends in large datasets. Apart from that, digital tools and platforms can facilitate interdisciplinary collaboration and communication between scholars from different disciplines, allowing for the integration of multiple perspectives and approaches to studying complex social phenomena such as the EU. Additionally, digital platforms can facilitate public engagement with research, enabling citizens to participate in research projects and provide feedback on research findings.

The changing world and a new interdisciplinary research approach may have significant and specific implications for European foreign policy. Traditional foreign policy analysis focuses on the state as the primary actor and views international relations as a system of states pursuing their interests in a competitive, zero-sum game. This perspective has been challenged by new conceptual frameworks that recognize the growing importance of non-state actors and transnational networks in shaping foreign policy (Costa & Jørgensen, 2013). These approaches emphasize the need to analyze the EU's foreign policy in a broader global context, taking into account the evolving nature of the international system, including the rise of new powers, the emergence of new security threats, and the growing interconnectedness of global issues. The complex internal contexts of the Union's member states must also be taken into account, as they are very much determined by cultural and social

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kinds of social behavior. Such intermediate-range theories, lying between the minor but necessary working hypotheses that evolve in abundance during day-to-day research and the all-inclusive systematic efforts to develop a unified theory that will explain all the observed uniformities of social behavior, are indeed essential for bridging the gap between empirical generalization and the sweeping but more abstract statements of sociological theory." ("The Role of Theory in Social Research).

<sup>5</sup> I see intermediate theory as a type of theoretical framework that focuses on the relationship between micro-level processes and macro-level structures. It aims to bridge the gap between theoretical concepts and empirical observations by providing a more nuanced understanding of the ways in which social processes interact with structural constraints.

factors, economic circumstances and historical-path dependency. Research needs to ensure that global, regional and local contexts are taken into account in empirical observation on Europe in times of intense transformations and turbulences.

### **The role of youth for the changing world and in the new geopolitical scheme**

Here, the role of young people is increasingly significant. It is an often repeated truism that young people are the future leaders, innovators, and agents of change. Their actions and perspectives will shape the direction of society in the coming decades. In terms of geopolitics, young people are increasingly engaging in global issues and are using new forms of communication and activism to advocate for change. They are also challenging traditional power structures and demanding greater participation in decision-making processes. At the same time, young people are also facing unique world challenges such as unemployment, poverty, inequality, but also climate change, alienation and divestment, all of which will have a significant impact on their future prospects and quality of life. For their part, governments, international organizations, and civil society are increasingly recognizing the importance of youth engagement and empowerment. This includes initiatives to increase access to education and training, promote youth entrepreneurship and innovation, and facilitate youth participation in decision-making processes. Young people are also playing an important role with regard to the new geopolitical scheme by promoting values such as democracy, human rights, and environmental sustainability. They are using social media, digital technologies, and other forms of activism to connect with peers around the world and to promote their vision of a more just and equitable world.

The role of European youth in the changing world and in the new geopolitical scheme is crucial in view of population aging in Europe. The actions, perspectives, and aspirations of young Europeans will have a significant impact on the direction of society. Thus, it is indeed essential to promote the engagement and empowerment of youths in all spheres of life, and to recognize their potential as agents of positive change.

The role of the young generation today differs from that in the past in several ways. Today's youth is facing some key changes. The widespread use of *digital technology and social media* has revolutionized the way young people communicate, learn, and engage with the world. They have access to a wealth of information and opportunities that were not available to previous generations. *Globalization* is not only a megatrend; it is a way of life for young people. They are more likely to be exposed to different cultures, languages, and ways of thinking, and to see themselves as part of a global community, than any past generation. The increasing interconnectedness of the world has created new opportunities but also new problems for them.

The *environmental awareness* of young people is at the heart of the growing environmental sensitivity in Europe and the world. Young people today are more aware of the impact of human activities on the environment and are more likely to

be engaged in environmental activism and sustainability efforts. *Education* is more widely available and accessible to young people today than in the past. This has led to higher levels of literacy and education, as well as greater opportunities for young people to pursue their interests and passions.

Last but not least, there is the importance of *youth activism*. Young people today are more likely than past generations to be politically engaged and socially active. They are using their voices and social media platforms to advocate for causes they care about and to demand social and political change.

### **Conclusion: The future of the EU**

The future of the European Union is complex and uncertain, and many factors may shape its trajectory in the coming years. Some of the key trends and challenges that are likely to apply were mentioned above (geopolitical and economic changes, climate change and sustainability), but there are also developments internal to the EU, and with perhaps irreversible consequences, such as Brexit, nationalism and populist movements, the growing concern about so-called “Brussels bureaucracy”, and attempts at de-Europeanization. The future we are thinking about will depend on how these and other challenges are responded to, and how Europe adapts to changing global and domestic conditions. Some of the key debates and decisions that are likely to shape the future of the EU include the reform of the EU’s institutions and bureaucracy, the future of the eurozone, the future of EU enlargement, and the leadership capacity of the EU in global affairs.

Sustainability is an important issue for the future of the EU because it is closely connected with many of the problems and opportunities that Europe and the world are facing. Sustainability is important for the future of the EU in several ways, as it is relevant for specific dimensions - environmental challenges, economic opportunities, and, related to these, social equity and good governance. Environmental issues are closely linked to sustainability, and require the adoption of respective policies and practices. The transition to a more sustainable economy can additionally create new economic opportunities for the EU, connected with renewable energy, green technologies, and sustainable agriculture and forestry. Sustainability is also closely linked to social equity, as it involves ensuring that economic growth and development are socially and environmentally just, not “leaving anyone behind”. In striving for global leadership in this respect, the EU has ambitious sustainability goals, including those defined in its Green Deal agenda. This ambition could enhance the EU’s reputation and influence in global affairs. I personally assess the sustainability perspective to be important in its connection with many other issues and megatrends that the EU faces.

A new interdisciplinary approach to our topic of interest should combine the reliable methodology of sociology with the strong theoretical foundation of areas such as political philosophy, law and political economy, in order to indentify the multiple characteristics of the external and internal contexts that might impact Europe’s future. In the modern world of digitalization and ubiquitous information, awareness (or, in

some cases, mistaken belief) is not difficult to attain. The problematic task is to apply thinking, correct analysis and synthesis. Today's world can be seen as a puzzle. And we know solving puzzles is fun but can be very difficult. It is up to us, the citizens of Europe and the EU, to deal with the difficulty. Will we find all the pieces, put them in place and combine them in a way that matches the model we had in mind and put into policy? Solving puzzles is a favourite pastime for children and young people. Let us hope the young generation will be good at it where the future of the EU is concerned. We should support them along the way by promoting their knowledge and skills.

### **The structure of this book**

The aim of this book is to outline the framework of an interdisciplinary approach to research on Europe and the EU, and to provide a sufficient stock of data and research experience, related to our subject, drawn from different sciences (sociology, political philosophy, law, economics). The solid foundation for this research would have to be social surveys, databases and qualitative information. The population under investigation are the young European generations but people from this generation also figure here as authors of many of the articles.

The articles in this book are divided into three sections. The first of these, entitled **“Europe, the EU and our Common Future”**, covers several important topics such as the European Union's role, institutional architecture and essential values in times of turbulence (Professor Georgy Fotev); the transversal policy of the EU and the mechanisms of the Union's foreign policy (Diana Petrova); the role of the Single Market for Europe's economy in the present and in view of the future (Ani Dimitrova).

The second section is entitled **“Digital Europe”**. I define “digital Europe” as the use and development of digital technologies to drive innovation, competitiveness, and growth across the European Union. Digital Europe aims to harness the potential of these technologies to stimulate economic growth, improve the quality of life, and address societal problems related to social inequality, climate change, healthcare, etc. All three articles in this section turn special attention to some aspect or other of the digital divide: “Gender Inequalities in the Digital Domain. Bulgaria in a Comparative Perspective” (Professor Rumiana Stoilova); “Bridging the Digital Divide: A Comparative Analysis of Media Literacy in Europe and Bulgaria during the Pandemic” (Stefan Markov) and “Digitalization and e-Government Development in the Election Program of Bulgarian Political Parties: Promises, Realities and the Wider EU Context” (Martin Konstantantinov).

The title of the third part, **“Smart Europe and its People”**, contains a term describing the vision of a European Union leveraging the power of technology and innovation to create a more inclusive, sustainable, connected, and prosperous society. This includes using digital technologies to improve public services, enhance economic competitiveness, and drive social progress and better professional chances. “Smart Europe” can be interpreted as a call for citizens to be actively engaged in shaping and benefiting from this vision. The articles in this section discuss quality education

and training and issues related to the European Education Area (Professor Wolfgang Schuster); human capital investment; the NEETs and ways of dealing with labor force shortage in a comparative perspective between Bulgaria and Austria (Daniela Dimova); digital skills as needs or opportunities for young people in contemporary Europe (Kamelia Petkova); and digitalization and ethnic discrimination through the eyes of young people in Bulgaria and Southeastern Europe (Katerina Katsarska). The section ends with the study on the European dimensions of the modern identity of young people in Bulgaria (Albena Nakova).

In fact, the three parts are very closely interrelated. Not only because the articles in them express and apply in their entirety the interdisciplinary research approach that I discussed here, but also because their common denominator are the people of Europe. Whether they are promoting digital literacy and skills, encouraging civic participation in decision-making processes, or fostering a digitalization and culture of innovation and creativity, all these texts essentially explore a collaborative effort to create for everyone a smarter, more sustainable, and more inclusive Europe.

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I would like to extend my gratitude to a number of people who made this publication possible. First and foremost, I should thank the authors for their excellent and valuable contributions. The exceptional value of this collection derives from the inclusion of articles by distinguished scholars and significant names in Bulgarian sociology, but also by young, promising scientists and PhD students. The interdisciplinary approach to the study of the EU and Europe is illustrated with analyses and empirical studies from different scientific fields - sociology, political philosophy, economics, and law. The texts display in a highly professional manner the use of a wide variety of research techniques and methods, including quantitative surveys, qualitative studies, desk research, and document analysis.

Further, I would like to express my gratitude to Vladimir Vladov for his excellent work in proofreading and editing. My warmest thanks to Ambassador Associate Professor Zdravko Popov, who provided the references that contribute to the high academic level of the publication. Finally, I extend my gratitude to Prof. Marin Drinov Publishing House of the Bulgarian Academy of Sciences for their highly professional work; and specifically to Ms Daniela Vassileva for her patient support and generous understanding.

I hope you enjoy our publication!

*Rumiana Jeleva, Editor*

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## **PART I:**

### **Europe, the EU and our Common Future**





# The European Union in Turbulent Times

Georgy Fotev

**Abstract:** *In the article, the author explores the nature of the EU as a supranational entity, which is unparalleled in human history. In the context of the understanding of societal development as a non-linear process, the author discusses the formation and further development of European values and European identity. The author considers the European Union as an extraordinarily complex multinational society at the same time in a supranational form, which is in fact its uniqueness, but also from which a number of challenges arise.*

**Keywords:** European values, European identity, multinational society, project.

Social development is a non-linear process. This is a universal rule, but one that becomes visible only in late Modernity. In the pre-Modern ages, societies were, broadly speaking, traditional. The core meaning of social life in those societies is located in the past, which, as a rule, is considered sacred and legendary. Time is cyclical. Non-linearity is implicit in the life cycles and is invisible, except in case tradition is violated – an act that is qualified as scandalous and is mercilessly punished. The breakdown of traditional society is a breakdown of cyclical time. The starting point of the modern age is the discovery of linear, vectoral social and historical time. It is no longer important what man (free of natural and other dependencies) used to be, what society used to be; the important thing is what they could be. The past has only an instrumental value for the present and, anyway, is subjected to creative destruction. Relations between generations change radically: the young generations are carriers of change. The future, not the past, has supreme value. In the modern age, linear development assumes two forms, which are polar opposites: rise and decline. The two forms of linear development were distinctly visible in the 19<sup>th</sup> century (the age of Romanticism).

The two forms of linear development were shattered in the first decades of the 20<sup>th</sup> century. In non-classical science and with the end of traditional (classical) epistemology, historical and social development came to be conceptualized as a **non-linear process**. Every social fact is seen as ambiguous. The late modern age is marked by growing complexity and continuous acceleration of social time.

\* \* \*

The European Union is a historically unprecedented political, economic and cultural formation. It is pointless to make comparisons between the EU and pre-modern formations, such as empires, principalities, etc. It is also absurd to compare it with

formations such as the colonial systems of the modern age. The EU is a polar opposite of the Soviet Empire. It is a multi-national state with a federative structure. As a political unity, it is essentially different from the various unions, known to us from the past and present of the modern age, between national states. Those other unions have never involved a voluntary or forced relinquishment of national sovereignty. Membership in the EU is based on voluntary partial abandonment of sovereignty in the name of unification. By this and other characteristics, the EU is an unprecedented political formation. Voluntary relinquishment of national sovereignty is not motivated by willingness to lose national identity. On the contrary, the EU's motto "Unity in diversity" is not a decorative phrase but a serious principle counteracting against homogenization, the latter being, for many reasons, a real tendency in the context of globalization. Of course, the emergence, development and strengthening of the EU is not a result of teleology, of objective historical reason or any such metaphysical force. The achievements of this unique union are due to successful testing of the fundamental European values. The EU member states are active societies.

\* \* \*

Europe is the birthplace of the nation, of modern society, of the national (modern) state and of the fundamental European values. In the course of world history, modernization became a universal phenomenon, which does not entail the march of Europcentrism (which was a brief ideological episode, overcome by Europeans themselves), excluded thanks to the European values that serve as a horizon and way of relating to the world. Social development is a *non-linear process*, unlike industrial, technological, etc. development. European values, in their actual functioning, are in many respects in constant latent or visible mutual tension and conflict, and that is why the development of Europe has known rises and falls, severe crises, which, however, have been overcome.

The mutual connection between the nation as a community and the national society contains internal contradictions. The nation is separate and self-enclosed, just like any organism. It is internally animated. Society is rationally organized and is without a soul, like any mechanism. It is open insofar as it is guided by the principles of rationality, strives to rationalize social relations and activities.

At every stage of modernization, rationalization, which may assume various forms, is of axial significance. The types of rationality in some cases are mutually supportive and galvanize each other, but, not infrequently, are in latent or manifest mutual tension and conflict. Industrial development is a linear process, i.e., it is unambiguously defined as progress. This creates the deceptive impression of a progressive social development. But social development is non-linear. This is due to the contradictions between types of rationality, but also to the fact that some aspects of human life cannot be rationalized.

The rationalization of social relations inevitably impacts on the nature of social ties and relations. Let us take, for instance, the family as a typical community based on love and trust between its members; and marriage as a contract between spouses,

a contract that serves as a rational framework of the family as a community. Contract relations in the family in terms of marriage are rationalized, rational relations. Insofar as the weight of these relations grows at the expense of community ties and relations, the latter grow weak and expire. Things are similar with respect to other kinds of communities. Here, we are specifically interested in the relationship between a nation (a national community) and a national society; this relationship becomes modernized in the perspective of integral modernization. The lines of rationalization require that societies be increasingly open, a trend that undermines national borders. It signifies that the fundamental value of the nation is weakening. The creation of the European Union became possible within a large-scale historical context. But historical possibilities are essentially different from historical reality. The popular maxim that “if” is a meaningless notion within historical discourse is something we should take seriously. The creation of the European Union as a possibility amounts to a choice from among many possibilities. Choosing is always a defining of values. That is why the European Union, as is often said, is based on the European values. As a rule, the young generations are the main driving force of the choice each member state has made to join the EU. They are free of the prejudices of the older generations.

\* \* \*

The market is a sphere of goal-oriented social action. The other name of the market is commerce. Commercial, commercialization are terms derived from “commerce”. The opposite of commercial exchange the *gift*, giving, which is a matter of gratitude, acknowledgment, respect and other such value attitudes. The gift is a disinterested action, an expression of solidarity, of altruism, humanism, compassion, nobility.

In modern Europe, in the name of rationalization, which encompasses a growing number of social interactions and interrelations, we witness an expansion of commercialization, which is acquiring a negative connotation. The expansion of the service sphere, at the expense of the production of material goods, is an *expansion of commercialization*. The latter is turning into an instrument of governance in areas like healthcare, education, culture, and even policing; these are areas in which non-commercial motives of action were traditionally predominant. In many cases, the problem is precisely the change and substitution of the motive of action. People occupied in healthcare naturally have material needs, just like any other members of society, and their highly-qualified work should certainly be justly rewarded; but when post-material motives are set aside, at the expense of goal-oriented motivation (remuneration), this is designated as commercialization in the negative sense of the term. The advance of commercialization into the sphere of culture is an especially dangerous trend. Mass culture “naturally” makes high culture in fact impossible, and the purpose of culture is to expand its influence as far as it can. When the market enters the sphere of culture, the dictatorship of mass taste sets in and the dividing line between high and low culture is effaced.

Commercialization is most often perceived in the terms of *linear development*, in contrast with spiritual or postmodern values. In Europe generally, and especially

in the enlarged European Union, which is open to further enlargement, remarkable positive results are evident in those differentiated life spheres or sub-systems of societies in which market mechanisms have entered or are entering. Much wider social strata are much better educated and professionally qualified; the same is true as regards the health of nations and the average life expectancy of their populations. Many other examples could be given. In the perspective of non-linear development, we should not overlook the negative sides of commercialization. It is true that many new achievements have been made in the welfare state, born in Europe at the end of the 19<sup>th</sup> century, linked to the name of Bismarck, and further developed by Adenauer and Ludwig Erhard after World War 2, etc. The European Union has powerful programs and mechanisms for providing support in the member states for life spheres in ways that are in harmony, as far as this is possible, with the development of the national societies and of European society in the framework of the EU.

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The world, including Europe and the EU, has entered a new age. We are living in a world of growing insecurity. The pace of changes is increasing and the future is becoming ever more opaque. There is no need to sow added insecurity, alarm or fear. Courageous thinking and new ways of coping with security are needed. In all ages, people have dealt with the only thing that is certain in life – their own death. Legends, myths, reincarnation, the afterlife, posthumous fame, immortalization through art, etc., are ways of coping with this cardinal existential problem. Today's generations and their descendants must deal with ***constant insecurity***. Earlier, the prevailing conviction was that insecurity could be overcome by dealing with its sources and by the triumph of security. The situation today is radically different.

The future is nothing. What we can say about the future is contained in the present in terms of resources and preconditions of various kinds. The emphasis is on the definition of the future as that which is not yet and, in this sense, is nothing. The trends in the present European Union shed light on the otherwise quite impenetrable future. Looking into the present, we inevitably turn our attention to the past of the EU and turn the pages of its genealogy.

The present is not cloudless. We have the impression that it is passing from one crisis to the next. The phenomenon of crisis has two common traits that people are not aware of or forget about. A crisis appears abruptly and surprises, even though dark clouds had been looming.

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EU unification and enlargement, based on voluntary choice, reflect ***the countries' awareness of their mutual interests*** but above all of fundamental and, for a large part, permanent values. The outright or concealed enemies of the Union overlook the radical difference between the EU and other well-known political formations in human history and in the present. The EU was not created through coercion, through conquest or revolutions, and is not maintained by force. These facts are like

a hammer (Nietzsche) beating on the heads of those who portend its inevitable breakdown.

The EU, as a project, is not a utopia and that is why its realization does not rest on force. The implementations of the Communist and National-Socialist utopias were nightmarish illustrations of the connection between utopia and monstrous violence. The creation of the EU rests on contract. This is not a rebirth of Contract Theory from the early Modern Age. It is not appropriate here to enter into comparisons. The contract on which the EU is based has a previously assimilated shared system of values, or compatible values, functioning in the national societies and characterized as European values. Nobody wants to impose his own values on others. This is the cardinal difference between the EU and all empires or colonial systems known to history, or the totalitarian systems of National-Socialism, Fascism, and Communism. If the specificity of the value foundation of the European Union is not understood and discerned, then nothing has been understood. The unprecedented treaty is based on interests as well. Who would enter a union that was not ultimately useful to him? Nobody who knows what he wants.

The crises the European Union has experienced are inevitable, as are natural and normal the processes of its functioning and development. Every form of life, every life process, is characterized at certain stages by crises, when the need for changes has grown ripe and it becomes necessary to reject established standards, views, criteria, etc. The crisis occurs when a certain order (form) has exhausted its potential and a sharp need for something new arises. Innovation (the new) is in all cases creative destruction (Schumpeter) of some kind, format and nature. The development of a given rationality has irrational effects. Something that was functional becomes dysfunctional. Latent tensions and conflicts become evident. Conflicts in the European Union, as we well know from the sociology of conflict, are as valuable for the social organism (system) as is the coordination between the parts and the whole, or as is the principle of social harmony, cohesion, etc.

Some interests are mutually contradictory, just as some interests nourish one another. The values functioning in society unite and disunite. The tensions, conflicts and crises arising in the EU are in some cases of a universal kind, the kind that appears everywhere. But there are tensions, conflicts and crises that are specifically typical for the EU as a unique formation. In complex societies, such as the separate national societies and the EU as a society, there is a need for systematic empirical surveys that may serve as the basis for productive decisions.

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Since its establishment, the EU has been put in question and rejected. Countries voluntarily become members, each country meeting the general rules, requirements, membership criteria, etc. Nations (national societies) voluntarily enter the EU while remaining national states that have limited to equal degrees their sovereignty, a decision which is in the national interest of each of them. One of the most painful problems is voluntary rejection of part of the national state's sovereignty, a sovereignty



that has been inviolable as a whole, so that any infringement upon it has had bloodshedding consequences. Naturally, when a country becomes a member of the EU, not all people in that country approve of this previously unimaginable act, and a considerable or negligible minority of the members of a national society yield to the majority while continuing to disagree. In addition to value-based internal contradictions within society, there are also tensions and conflicts between social groups, based on their group interests. Whether a country be or not be a member of the EU, there are always internal contradictions, tensions and conflicts in it, due to the varying interests of social groups and communities; due to social, and other, inequalities – legitimate or non-legitimate; due to negative polarization of values (for instance, national identity stands high in the scale of values for some people, while European solidarity and self-identification is a matter of pride for others, etc.).

EU membership is voluntary, but of course the voluntary choice is not, and cannot be, considered shared by the whole nation, by every citizen in each country; although the opponents of the project are generally a minority, there is no guarantee that in the course of time they will decrease. There are eloquent examples when the opponents grow in number and organize into political parties that seek to have their country leave the union. This happened in Great Britain, where neither internal efforts, nor external influence from the EU were able to stop Brexit.

The national societies organized into the European Union form a multi-national European society and, in a sense, a supra-national European society. The political (state) form of the EU as a multi-national society is not, however, a federation (a federative state), as are, for instance, Russia, Germany, etc. It is not coincidental that long discussions are going on about transforming the present political model into one similar to the USA, into a United States of Europe. There are serious arguments in support of such a change, which would surmount certain difficulties and make the functioning of the EU more effective in a number of aspects, in terms of foreign policy, defense, etc. It would be sensible to adopt well-tried solutions to arising political problems; but above all, it is necessary to adequately define a given situation. This is a key aspect of internal and external policy of the EU. Not infrequently, the quality of virtuosity is needed, as Hannah Arendt, the brilliant 20<sup>th</sup>-century political thinker, specially pointed out.

We may not overlook the differences between the West European countries on one hand and, on the other, the Central and Eastern European countries that acceded to the EU. Over a relatively short period of history, differences became visible between the two groups of equal members of the Union. The sustained differences between West and East Germany are very familiar not only to Germans, despite the powerful support given to the acceding Eastern part of the country, which had been for several decades a totalitarian Communist state within the boundaries of the Soviet empire. After the implosion of the totalitarian Communist system, symbolized by the fall of the Berlin Wall and the abolishment of the Iron Curtain, there were widespread expectations for immediate escape from the past; respectively, experts and social scientists believed that social development would go on smoothly, along a linear trajectory. In fact, this is not happening.

Regrettably, there is an extreme shortage of studies on the totalitarian Communist system and on how the liberated peoples made sense of the lives they had led under that system; the discourse is reduced to declarative rejection and superficial explanations. This is one of the obstacles to seeing the actual problems involved in this radical and unprecedented transformation. Many of the problems are hard to solve, and the resources for solution are lacking for some. The same problems look differently in different perspectives, in the generalized perspective of the former Socialist countries on one hand and the viewpoint of the Western democracies on the other. Despite the unity of implementation of the Communist project, there were visible differences between the developments in the different Soviet bloc countries. All know, even without making comparative analyses, about the difference between Poland and East Germany, Rumania, Czechoslovakia, Bulgaria, etc. It may be said here that in sociology and similar sciences, generalizing concepts are important, but much more important, crucial and of foremost relevance are typological concepts.

The motto of the EU is “Unity in diversity” (Latin: *varietate concordia*). It is understandable that people – one might say as a rule – are not inclined to go to the bottom of what seems so obvious in this phrase. A not very in-depth interpretation would be open to hasty conclusions based on empirical observation and even on obvious trends that appear for certain periods of time. Both the *unity* and the *diversity* referred to here have multiple dimensions. It is not possible in the space of this article to go into the details of a topic that is vast and rather complex. When we consider the national societies that make up the EU, we see that each of them has its specific character, and when it is said that the final goal and supreme value is unity in diversity, what is had in mind is a kind of preservation and development of diversity, not homogenization or some vague kind of assimilation. It is natural for tensions, contradictions, some conflicts or other, to arise within the EU or within a member country or countries in connection with decisions of the European Commission or European Parliament, for instance.

Sovereignty is experienced by the citizens of a state, who define themselves within a collective national identity. That personal or individual identity is inconceivable apart from collective identity is a universal principle that has unfortunately not been clarified enough. Every member of a national society defines his/her personal identity in the context of his/her collective national identity. These are only some of the aspects of experiencing national sovereignty and its meaning. The partial relinquishment of sovereignty by France or Spain as EU members is not experienced in the same way by them as by Poland or Hungary or some other Central and Eastern European country that was once part of the Soviet empire. Considering the history of Poland, we see how painful the issue stands there in the light of history, and the sensitivity the Poles have developed. Things stand very differently for them than for other EU members. Migrant waves are a different matter for France and Germany than for Hungary or some other countries. Solidarity is a fundamental European value, but every true value functions in a social, cultural, historical, etc. context. This view is not a fall into the relativism that undermines the value and ultimate aim of the EU.

Mutual understanding and familiarity between the member states is necessary. The process by which the politically organized European nations get to know one another flows naturally along the channels of free movement of goods, people and information, etc. The course of cultural exchange, mutual knowledge and rapprochement is effectuated through education, but this is, as a rule, a one-channel course connected to elite universities located in a few countries. It would be well to accelerate the growth of mutual familiarity between EU member states, for otherwise it would not be possible to rely on the formal mechanisms for maintaining and enhancing the unity in diversity. Formal mechanisms may produce homogeneity or may fuel disintegration.

There is increasing talk about the division of the European Union into two opposite voices. Some people are opponents of the Union, including extreme nationalists and petrified conservatives in the cultural and political aspect; others are concerned about disruptive trends, which they feel to be unstoppable. There is no place for *a catastrophic mindset* and attitudes here. The Union has a strong value basis that can be said to be unshakeable and able to withstand all kinds of turbulence. But these are only possibilities, not an inexorable determinism, which is an outdated prejudice.

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The future of the European Union cannot be conceived of and depicted through the optic of the past and of still functioning past historical models, though this is most often the perspective. A typical example is the idea of United States of Europe, with obvious reference to the USA. Some, for their part, sow tendentiously ideological comparisons between the EU and the Soviet Union. Some turbulences are intentionally fueled but others arise from the imperfections in the functioning of the multinational European society and its political form. Speculations about the future of the European Union, regardless of the motives underlying and impelling them, are harmful and at the very least useless. It is necessary to study with penetration the real processes and tendencies in the Union and in the irrepressible globalization. Humankind does not have at hand a reasonable ready answer to the question as to the future of the nation, which globalization is turning into a depleted fiction. Globalization is an unprecedented process in human history, which is not guided by ultimate values and goals. It is necessary to probe into the ongoing reevaluation of values considered traditional, the ongoing calculation of the cost of neglecting the care for and protection of well-tried values – a concern that is so characteristic of the attitude of European conservatism. Shortsighted leftist liberalism, which uncritically equates novelty with value, sets the burden of its own irresponsibility upon others.

The European Union has not had to resort to violence in constructing and constituting itself. In their emergence and development, national states were unable to avoid violence. The examples are countless. At the dawn of the modern age and of the birth of national states, the genius of Machiavelli warned that violence breeds hatred and hatred leads to violence. But if those who make collectively binding decisions (the politicians) have heeded the lesson of the Renaissance giant but have failed to

also understood that weak will and indecision are not political virtues, this oversight may practically lead to treason and unimaginable misery.

The European Union is an extremely complex multinational society, but it is also a supra-national form, in which lies its uniqueness. Complexity generates problems. Complexity always has visible and invisible sides according to the viewpoints and differences of perspective. Dialogue is more vitally necessary for the EU than for any other formation. The motto “unity in diversity” is conceived of through dialogue. Dialogue is not simply a conversation between two parties. It means a meeting of different viewpoints and the ability to acknowledge, to recognize, in order to achieve, when necessary, a positive polarization that rises from the depths of Europe as a spiritual form.

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When a person finds it hard to answer the question, “Who am I?”, then he/she is certainly undergoing an identity crisis. When we find it hard to answer the question, “Who are we?”, then we are certainly undergoing a collective identity crisis. This applies to any community, ranging from the family to the nation. The question, “Who am I?” is asked by a person, not just a human individual. The answer to both questions is quite simple. Regarding individual identity, the answer is “I am I”. Hard as it may be to believe, at times a person cannot simply say to him/herself, in quiet seclusion, “I am I”. Regarding the identity of the community, be it large or small, the answer is, “We are we”. Behind the seeming simplicity there is a deep well of identity. In a crisis situation, the person falls into a strange conclusion, and repeats in horror, “No, this is not me, it cannot be...” The drama for collective identities seems even more painful, because the people around cannot offer consolation and support.

The identity crisis, especially the personal/individual one, is a social and existential illness of our time, of the late modern age. Person and personal self are synonymous. The added “self” is a dimension of reflexivity (you see yourself). The person appears in immediate encounter with another person, because in encountering a person, you spontaneously define yourself as your own person (you are not impersonal). In front of an object, a human is a human, but not a person. The person cannot be substituted. Theatre, imitation and pretending to be someone else in everyday life is a different matter. Depersonalization is the most awful downfall of modern man. It is the death of a person. That which remains of a person becomes a tool in the hands of someone else; what is happening then is the *reification* of the person (the transformation of a subject into a thing), a vegetating, etc. The crisis of personal identity is the impossibility of death.

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In the late modern age, a process of individualization emerges; this, too, is a possibility, in view of the growing complexity of the world and of the fundamental European values, such as freedom and the self-value of the human being as an aim in him/herself. Individualization is perilous if it destroys community cohesion in the life

of people. In such a perspective, the connections and relations between values and interests come to the fore.

In the late modern age, the members of society enter into relations that are anonymous. An anonymous social relation is not between persons. It is between social roles, statuses; it is a functional relation, interaction and interrelation based on impersonal rules, and a person's voice becomes a voice in the wilderness. Such relations are functional or structural, not interpersonal. It seems we stand no chance of escaping from the growing functionalization of living with others. Human individuals are simultaneously members of different – dozens of – social groups; and they respectively play different roles, or have to change roles. People prefer not to ask themselves the question, “Who am I?” All the absurdities that come with the breakdown of personal identity stem from loss of community (there are countless people around us, as well as non-people, such as intelligent machines, but there are people close to us). True, there are some individuals who are entranced by their automobile: if they could, they would embrace it as they would the beloved woman they do not have, and caress it; but that would not be a close person. Collective (community) identity is in crisis. Collective identity is supra-individual. It is based on mechanical, not organic, solidarity. In a community, the individual person is surrounded by persons. A person without collective identity is doomed to suicide.

The sublime idea underlying the initial project of modernity (the birthplace of which is Europe) is the community of individual persons. To be recognized and respected as an individual is a principle of modern communities. This is not a utopia but a never-ending task of human reason (a reason of the heart, a reason of the mind and of deeds). This is the meaning of “freedom, equality, brotherhood”). The great problem is that each of these magical words is understood and used in different ways. Freedom is a supreme value that is magically attractive for the young generations, who have yet to undergo the experience of life with responsibility. The productive perspective is in the categories of non-linear development. Naturally, the two basic perspectives of liberalism and conservatism are joined in the EU. The contradictions that arise often have a generational coloring.

In striving for a better world, humankind has encountered hopeless obstacles and has had dreadful downfalls. We do not know what tribulations are yet in store for us. What is plainly obvious today is the waning of personal identity as a supreme value and of community identity (the nation) as a supreme social value. The individual person and the nation as a collective identity were already visible at the dawn of modern European humankind.

The globalization going on in the late modern age is an unprecedented process in the history of humankind. The sociologist John Urry describes society as mobile; Bauman defines the modernity of today as fluid. The global visions encounter formless processes and phenomena. Are nations and national states not in fact turning into exhausted fictions? Globalization is an unprecedented process guided not by ultimate goals and values. Nations were born at the beginning of the modern age and their birthplace was Europe. The nation is par excellence a collective (community) identity

that becomes a supreme social value. But the free movement of people, capital, information, and values has undermined the nation as a supreme value. This is a severe dilemma, where the crisis of collective and individual identities opens wide. The analysis must go to the very bottom of the problem. Chatter is a waste of time. The question is posed pointblank, without equivocation: Do the members of a national society want to, are they prepared to, shut that society down? Do they know what they want? A pure national identity signifies the end of the open society.

The future is becoming increasingly opaque and ignorance of it is growing. In such a situation, increasing reflectiveness on the process is becoming a fundamental condition of unending modernization. But we can no longer rely on the experts. It is necessary to hear the voices of those who will suffer the consequences; which shows that democracy is not losing its value – on the contrary, its value is becoming increasingly significant.

Many intellectuals are sounding the alarm about renascent nationalisms. Large public circles of educated people feel anxiety about the revival of old-fashioned nationalist yearnings. To describe nations, in a cold analytic language, as a depleted fiction would be a devaluation of the fundamental modern social value. There is a growing mass of new nationalists who keep awake at night (new, because the world has changed beyond recognition) and offer simple “solutions” to complex problems. They think they are awake in the night. The sober ones who do not want to be rootless (the rootless person is Nobody) cannot continue their pose of arrogance. A penetrating gaze is needed, a search for the meaning of the spiritual situation of our time and a courageous stance with regard to the real crisis of national and existential identities. The radical problem lies not in the proliferating and menacing neo-nationalisms but in the conditions that provoke them. The radical approach is that which goes to the root of the matter.

The depersonalization of the human being, the loss of personal identity, is a desperate crisis of humanism. The birthplace of humanism is Europe. The core of humanism is the autonomous value of the human being made of flesh and blood. If a person is not an aim in him/herself and an autonomous value, because he/she has been turned, and has permitted to be turned, into an instrumental value, if humanism has become an empty sound, this is no less than the death of Man, following by several centuries the death of God, which the young Hegel already wrote about, as did Nietzsche later on. Just as Nietzsche asked, “Who killed God?”, so we may ask, “Who killed Man?” But as long as we can ask such a question, not all is lost. It is our duty to discern the roads and paths of alienation that brought us to this darkness, to this pathless human condition. Since the night has not yet become pitch-dark, it is high time to begin a reevaluation of all those values that have displaced Man as an aim in himself and as an autonomous value. The task is not impossible. It suffices to awaken the will to be. People are in need of sleep, of that natural, sweet dream about the coming robust wakefulness. But there is a sleep that comes from laziness and forgetfulness of being. That is what the bell is for. It wakes the sleepers. It wakes them in a profound sense. The awakened listen to the tolling bell in an ecstatic state and their existence is thrilled.

The time has come to reevaluate the values that have devalued the two basic forms of identity – community (collective) and personal (existential). Examples of reevaluation can be found, there is no need to invent them. If love has linked two persons of different nationalities, this does not make their child a cripple with regard to collective identity. There is no law of collective identity in general that would dictate such a consequence. If the human person is not alienated from his/her role, function and situation, but sees meaning in them, then that person can live him/herself. These examples do not aim to distract attention from the severe demands we face today. But they may be the seed of hope needed at the start of every hard and long road to the unknown.

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Individual identity is inconceivable without collective identity as its foundation. Collective identity has many layers. The fundamental structure of identity is time, i.e., it is historically determined. There are many forms of time and here I have in mind one that is crucial for the human, i.e., the social, world. But this kind of time is substantially connected with and in changing dependence on space, which has many forms that are different from physical space.

Naturally, European identity is subject to historical development. Social development in general is non-linear. This is the perspective in which I make an in-depth interpretation of the EVS Fifth Wave data on European identity. The framework of interpretation is how the members of different European societies covered by EVS understand the European identity according to basic indicators, such as Christianity, ancestry, place of birth, and culture. Among the countries covered by this study, Bulgaria and Sweden stand at the two opposite poles.

In general, Bulgarians tend to share a rather traditional or classical notion of European identity, while the Swedes tend to share an understanding of European identity that is characteristic of the late modern age.

Polarization, even when it is viewed as positive and different from negative polarization, raises serious problems related to the interpretation of the motto “unity in diversity”. The openness of European identity, one of the basic principles of which is tolerance as a fundamental European value that galvanizes diversity, raises the difficult problem of the limits of tolerance. There can be no doubt that boundless relativism is a destructive principal.

The large majority (a little over 80 percent) of Bulgarians attach a positive meaning to ancestry with regard to European identity. At a minimal distance from the Bulgarian percentage is that of the Hungarians. Most countries in which a share of over 50 percent of respondents asserts the importance of ancestry were in the former Socialist bloc. Georgia and Estonia are not in this range of percentages, but surprisingly, Italy is. This indicates the need to control general concepts by means of typological concepts and, respectively, by individualization of value constellations. Bulgarians are not more conservative than their neighbors, but, as in the case of any individualization, it is necessary to clarify the historically defined life trajectory of a country's development.

Only 20 percent of Swedes consider ancestry an important feature of European identity, which is the lowest score in the groups of Western countries that have shares of less than 50 percent of respondents sharing this opinion, such as France, where the dividing line for this question passes. In the perspective of non-linear social development in general, the positive polarization between Bulgaria and Sweden is ambiguous with regard to both countries.

The importance of ancestry is connected with the classical definition of European identity, but the division into two large groups of countries suggests that under the totalitarian Communist regime, there being practically no international mobility, a particular form of conservatism was maintained. There are, however, national specificities shaped by history. There is a difference between Bulgaria and the countries of former Yugoslavia or of the former Soviet Union.

The majority of Bulgarians (70 percent) connect European identity with the Christian identity, while less than 10 percent of Swedes are of this opinion. The ethno-religious composition of Bulgarian society sheds light on this stance. The main religious communities in the country are Christian and Muslim (a large part of the Muslims are ethnic Turks): the shares correspond to those who related European identity to Christianity (70 percent) and those who did not, who correspond to the share of Muslims.

Of the younger generations (Gen Z, born after 1997, and the Millennials (Gen Y, born between 1981 and 1996, the two showing no great difference in responses), a little under 60 percent indicate that it is justified to define oneself as a true European if one is a Christian. And of Gen X (those born between 1964 and 1984) and the baby boomers (born between 1946 and 1964), from 60 to 80 percent assert this connection between being a European and a Christian. Generational differences are apparent with regard to European identification, which is not associated by respondents exclusively with Christian religious affiliation.

For a little over 80 percent of Bulgarians, the place of birth defines European identity, compared with a little over 20 percent of the Swedes who choose this option. This indicates the low mobility of Bulgarian society and the strong territorialization of self-consciousness and self-definition. It should be stressed once again that the phenomenon is multidimensional and ambiguous. This is only one of the multiple dimensions: the other name of deterritorialization is homelessness.

Over 90% of Bulgarians attach great importance to cultural affiliation, while about 60 percent of the Swedes take this stance. This attitude is indicative of an attitude to multiculturalism, of cultural homogenization and the attitude to cultural contradictions in the modern world – a world characterized by insecurity that is becoming permanent.

The comparative closeness of the Bulgarian and Swedish percentages as regards culture, which are almost equal in relation to language and, respectively, to law, are indicative and serve as important pillars on the difficult path to the integration of European nations, which is based on values.



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The well-meaning or ill-intentioned critics of the European Union often use, in a negative connotation, the summary phrase “Brussels bureaucracy”, thought to be the cause of various adversities. Setting aside the motivation, which may be of good or bad intention, we can focus attention on the nature of the phenomenon. The first meaning of the concept refers to a rational organization of governance and administration. Its rationality consists in well-thought-out rules, designed to economize time and resources, including human resources, for the effective achievement of a desired, or intended, result. The management of social action and interaction, and the regulation of social relations, is based on rules and legal norms. Rules, and especially legal norms, are, in addition to all else, a question of justice. A state in which law is supreme is called a state ruled by law. The democratic state and the state ruled by law is considered just. Where there are rules and norms, discipline is necessary to fulfill and obey them. Discipline opposes the penalized violation of and disrespect for the rules. Discipline is a restriction and self-restriction and thus is a value that is in contradiction with some other values. All this applies fully to bureaucracy. As social ties and relations grow more complicated, bureaucracy grows: rationalization not only perfects itself but also becomes more complex, and its repressive functions, visible at the micro-level, increase.

The large scale of the EU as a very complex system – moreover, existing under conditions of growing complexity typical for late modernity – increases the production of irrationality; this is a phenomenon that Weber designated, long before today’s situation, as “the iron cage”. Since the EU is a democratic transnational society, and democracy is a fundamental European value, there is naturally a growing sensitivity to the paradoxical restrictions coming from Brussels bureaucracy. Seen in depth, this bureaucracy is not a matter of moral will, political shortsightedness or other such traditional explanations for the misfortunes of social life. The problems lie in late modern social ontology, which makes traditional moral regulations and political standards powerless.

The growing complexity of the macro-social system that is the EU enhances the role and importance of *modern meritocracy*. The mechanisms of meritocracy differ from those of democracy. The fundamental principle of modern democracy is the assumption that people know what they want, and as they are responsible for their decisions, i.e., for the consequences of their decisions, they can change their choice by drawing lessons from previous wrong choices. This was approximately so in previous ages, when societies were not so complex and, no less importantly, when social time was not so accelerated. This is no longer true. It is in many cases prudent to trust those who are truly competent, or more competent than us, on matters that concern us; but we must honestly admit that we do not really know what it is we want.

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The fourth industrial revolution is defined by the exponential acceleration of social time, which means the intensification of social changes as a result of the grow-

ing complexity of the already existing division of social reality into digital and offline reality. The new age is characterized by growing human insecurity (Fotev 2016). In all transitional ages of human history, people have been faced with greater or lesser insecurity, and have been convinced they could attain security through temporary or radical or supreme solutions: mythological, religious, rational, practical, etc. Security is final in the course of human life. But there comes an epoch when insecurity is final, and the question of all questions is how people can live in a permanent order of security-insecurity.

The European Union is a new world of insecurity. The future is increasingly non-transparent, and the horizon of transparency becomes shorter due to the acceleration of social time, the intensity of changes and the growing complexity of the world. What will the European Union be like tomorrow? This question naturally appears differently to and is experienced differently by different generations. The generation structure of European societies has undergone a long, at times dramatic, evolution. Relations between generations become dramatic when the older generations' experience and knowledge of the past become irrelevant for the younger, and even more so for the youngest, generations. The lessons of postmodern philosophy and sociology cannot be overlooked when formulating the problems that arise between generations with regard to the European Union and Europe in the visible future. Thanks to digitalization, the young generations have knowledge that, for understandable reasons, the old generations do not, or possess to a considerably lesser degree. Nevertheless, the older generations have knowledge and experience that is not negligible. Never before has dialogue been so vitally necessary. Dialogical reason is not a prevision of historical destiny but creativity in the social-historical life of people and nations. "Where there is no dialogue, there is shooting in the literal and metaphorical sense" (Fotev 2022:496). Dialogue is a stance in the world. The achievements of the EU and the realization of its motto are the visible realization of dialogical reason. This is what hope for the visible European future may rely on.

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**About the author:** Georgi Fotev is an Honorary Professor and Senator of New Bulgarian University (NBU), Sofia, Bulgaria. He is the author of a large number of scientific publications in Bulgaria and abroad. Professor Fotev is the National Programme Director of the European Values Study and Director of the Center for European Values Study at the NBU.

# Transversal Policy of the EU. Mechanisms of the Union's Foreign Policy

Diana Petrova

**Abstract:** *In order to cope with the challenges of the dynamically changing global situation, Europe as a Union must maintain a stable foreign policy and a sustainable transversal policy. As part of the European integration process, the EU's Common Foreign and Security Policy must be flexible and coordinated to withstand, and objectively function in the face of, growing geo-economic challenges. On the other hand, the transversal policy of the Union, providing an opportunity to empower citizen participation and belonging in legislative procedures at the European level, encourages commitment and support for the creation of effective policies. To provide an understanding of all the processes and mechanisms related to Europe's foreign policy, the text is structured in chronologically ordered parts tracing the stages of the EU's development.*

**Keywords:** European Union, Foreign Policy, Maastricht Treaty, international organization, politics, diplomacy.

## Historical overview

As an international organization (IO), the European Union (EU) is committed to contributing to strengthening international security and peace through the principles of the Charter of the United Nations (UN). As an essential part of the Common Foreign and Security Policy (CFSP), the Common Security and Defense Policy (CSDP) is inextricably linked to the role that the EU plays in the world. The action mechanisms of the member states are implemented according to the principles and powers regulated by the Lisbon Treaty of 2009. Three years ago the chairman of the European Parliament's Foreign Affairs Committee (AEFT), David McAllister, stated the importance of the EU's foreign policy, saying that „the Union has untapped potential in terms of common foreign policy and must act on the global stage with one voice, to strengthen its leadership and to develop its vision for a sustainable and inclusive future<sup>1</sup> (McAllister, 2020).

The Common Foreign and Security Policy (CFSP) of the European Union is a historical process developing parallel to European integration. After years of trying to overcome the consequences of the Second World War, in 1950 French Foreign Minister Robert Schuman announced the “Schumann Declaration”, a blueprint for

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<sup>1</sup> REPORT on the implementation of the common foreign and security policy - annual report 2021 | A9-0354/2021 | European Parliament (europa.eu)

a single “European Coal and Steel Community” (ECSC)<sup>2</sup>. The aim was to unify the production process of steel and coal in all participating countries. Months after the Declaration was announced, French Prime Minister René Pleven and Jean Monnet proposed the creation of a European army under a single command. More commonly known as the Pleven Plan, this proposal marks the beginning of the European Defense Community (EDC). Signed on 27 May 1952 by the six ECSC member states<sup>3</sup>, the EEO Treaty aimed to secure political support and a common defense system. It was not long before this agreement, as well as the subsequent “Fouchet Plan”<sup>4</sup>, failed.

After the failure of these initiatives, political cooperation was nevertheless resumed in Europe with the creation of the European Economic Community (EEC) and the European Atomic Energy Community (Euratom), which were established by treaties<sup>5</sup> signed in Rome in 1957<sup>6</sup>. Ultimately, a consensus was reached for joint political consultations, which, however, despite the decision, did not take place until 1974, when the leaders began to meet regularly three times a year (Leonard, 2010).

Once again, France offered political cooperation, and the Fouchet Council undertook the preparation of a draft treaty. The first such, called “Fouchet Plan I”, envisaged the creation of a union with a unified foreign and security policy. Under the plan, participating countries would also cooperate on policies related to culture, science, human rights, and freedoms. In this sense, after France once again tried to push through a proposal for political unification on the issue of defense, in “Plan Fouchet I” and the revised “Plan Fouchet II” which followed it, several contradictions are noticeable. In an attempt to solve some of the problems, this plan was finally rejected at the Paris meeting of April 1962. In short, the repeated attempt at political cooperation failed. The problems continued to worsen after France announced its withdrawal from NATO, which necessitated the relocation of the organization from Paris to Brussels.

In 1969, Georges Pompidou took over as President of France after Charles de Gaulle and, in his quest to expand the Community, raised the question of political cooperation in Europe. The French president proposed to the other member states to organize a summit in The Hague to discuss the prospects of the European Economic Community. The main goal of the meeting was to create a political union with a common foreign policy. The main decisions taken at this meeting were: building an economic and monetary union; launching new accession negotiations for Denmark,

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<sup>2</sup> Founded in 1951 in Paris, the European Coal and Steel Community (ECSC) includes Italy, West Germany, France, Belgium, Luxembourg, and the Netherlands. It was this coalition that laid the foundations for the supranational European union known today as the European Union.

<sup>3</sup> The six founding countries were Belgium, France, Italy, Luxembourg, the Netherlands, and West Germany

<sup>4</sup> Proposed by the French President Charles de Gaulle in 1962, the Fouchet Plan, as a result of cardinal changes in the political scene at that time, was terminated and remained unfulfilled.

<sup>5</sup> Treaty establishing the European Economic Community (EEC), Summary, EUR-Lex - 11957E - EN - EUR-Lex (europa.eu)

<sup>6</sup> The two structures began functioning on January 1, 1958.

Ireland, Norway, and the United Kingdom; and enlarging the Union by the accession of new countries. It seems that the economic union was only a basis for creating a political union, which should have a common foreign policy and exercise it. "It is clear that while the Communities' immediate goals are economic, their long-term goals are political" (Lasok, 1991: 242). Thus, the Hague Summit in 1969 was a great step that countries took in seeking a common agreement on foreign policy issues. After consultations held a year later with the European Parliament<sup>7</sup>, a majority of the Ministers of Foreign Affairs accepted the so-called "Davignon"<sup>8</sup> report. The document not only provides for a common foreign policy of the member states but also states that the countries must create the appropriate instruments to unite in a political union. Despite its broad agenda for political cooperation, in practice, the Davignon Report regulated and established the foreign policy and diplomatic relations of the six countries. It aimed to ensure better mutual understanding of important international political issues while strengthening the agreement and solidarity between member states. In order to achieve the goals and improve awareness, regular meetings were established: of the foreign ministers twice a year, and four annual meetings of the political committee which included members of the ministries of foreign affairs. Unlike the Plan Fouchet, the Davignon report was adopted without controversy or dissent and marked the beginning of coherence between the foreign ministries of the member states. Thus, in 1974, at a meeting in Paris, the European Council<sup>9</sup> was established. In the field of cooperation in foreign policy, in 1981 the foreign ministers of Germany and Italy proposed a report to promote European political cooperation.

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<sup>7</sup> The European Parliament is a legislative body with several delegated functions. The first function enables it to approve or reject any legislative proposal of the European Commission. It also oversees the EU institutions and, in relation to the budget, has the power to approve or reject EU budgets. Regarding international agreements, the EP has the right of veto. As far as CFSP and CSDP are concerned, the European Parliament has only a consultative role. According to the Treaty on the European Union, CSDP is an integral part of the Union's foreign policy. As a result of geopolitical dynamics, CSDP has undergone a series of changes in recent years. The first strategic framework of security and defense policy - the EU Global Strategy - was adopted in 2016 at the proposal of Vice-President/High Representative Federica Mogherini. After a series of discussions on the future of European defense security, the strategic compass was created a few years later, in 2021. This document regulates the policy for action and the general vision of the CSDP for the next 5-10 years.

<sup>8</sup> The Davignon Report, adopted by the Foreign Ministers in October 1970 and subsequently supplemented by other reports, formed the basis of European Political Cooperation (EPC) until the entry into force of the Single European Act (EEA).

<sup>9</sup> The European Council was created by French President Valéry Giscard d'Estaing to regulate the summits of heads of state and government and to strengthen supranational policies. It includes the heads of state and government of the EU countries, the President of the Council of the EU and the President of the European Commission. It is not a legislative body; the Council discusses matters and conducts negotiations between the governments of the member states; it also defends national foreign policy. The High Representative also takes part in the discussion of foreign affairs issues. An important clarification is that, in making decisions, the EU is guided by the principle of unanimity. Decisions are made solely by the Member States.

Two years later, the European Council in Stuttgart adopted the “Solemn Declaration on the European Union”, in which the countries expressed their desire to form a “European Union”. The declaration has undergone a series of changes and the newly introduced text offers a significant advance in political cooperation as a prerequisite for the creation of the Single European Act (EEA)<sup>10</sup>. Although the long-awaited “European Union” did not appear until the Treaty of Maastricht, the EEA contained within itself the supporting construction of Maastricht.

### **The Maastricht Treaty**

Since the founding treaties up to that point had not contained texts affirming a democratic system of government and protection of human rights, these found a place in the Maastricht Treaty. In the Preamble, the member countries show their readiness for common citizenship, strengthening and convergence of economies within a single institutional framework. The EU Treaty sets the objectives of the Union, according to which it is extremely important to protect the interests and rights of the citizens of the member states. According to the treaty, the European Union is based on three pillars: the first of these is the European Community; the second is the Common Foreign and Security Policy (CFSP); and the third is cooperation in the field of justice and internal order (JID). Article C lays down the principle of the distribution of powers<sup>11</sup>. The Union must respect the national identity of its member states, and governance must be based on democratic principles. According to Art. 2 F, the EU will respect the fundamental rights regulated in the Convention for the Protection of Human Rights and Fundamental Freedoms (ECHR) consistent with the constitutional traditions valid for all participating countries as general principles of Community Law. In addition, the Union undertakes that “policy in this area contributes to the common goal of developing and consolidating democracy and the rule of law. The Community and the Member States will respect the commitments and take into account the objectives that have been agreed upon within the framework of the United Nations and other competent international organizations”<sup>12</sup>.

In the area of decision-making, the Maastricht Treaty promotes the legislative activity of the EP through the co-decision procedure. The first pillar of the Common Foreign and Security Policy (CFSP) in Article J1 sets out the objectives of this policy, including maintaining peace and strengthening international security according to the principles of the United Nations Charter, the principles of the Helsinki Final Act and the objectives of the Paris Charter for a new Europe<sup>13</sup>. It is important to emphasize that, until the Maastricht Treaty entered into force in 1993, the EU had no official

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<sup>10</sup> Single European Act, EUR-Lex - 11986U/TXT - BG - EUR-Lex (europa.eu)

<sup>11</sup> Ibid., Article C

<sup>12</sup> Ibid., Article 130 U

<sup>13</sup> Ibid., Article J 1

foreign policy representing the member states (Bindi and Angelescu, 2012: 268). The Treaty created the legislative framework based on three pillars; as Prof. Stephan Koeckeler<sup>14</sup> writes, “the first is a pillar based on common policies managed at a supranational level, or the so-called European Community; the second pillar will for the first time include a single official foreign policy and the last pillar will regulate legal cooperation between countries. About the second pillar, the Union aims to create and implement a common foreign and security policy, through unanimity achieved at the intergovernmental level between the member states” (Keukeleire and Delreux, 2014: 125-130). The foreign policy objectives established by this treaty are to “protect the common values, interests, independence, and integrity of the Union”. The 1992 treaty brought countries together in developing a common foreign policy, enabling the EU to speak with one voice on behalf of all (James, 2015). The CFSP is not uniform, as the different dimensions of foreign policy (economic, political, or justice) are included in the first and second pillars. While foreign trade and cooperation are within the scope of the first pillar, border management is included in the third pillar (Bindi and Angelescu, 2012: 284). Due to concerns about the possible loss of sovereignty, the member states were reluctant to come together and establish governance bodies and relevant mechanisms for a functioning and strong CFSP. The EU’s failing to react adequately during the war in Bosnia and Herzegovina and the Cyprus crisis shows the weaknesses of its CSDP. In these two situations, the Union failed at the geopolitical level. After this disappointing appearance on the international stage, the need for cardinal changes in EU common foreign policy became evident. As a result, a new attempt was made a few years later with the signing of the Amsterdam Treaty in 1997 and then the Nice Treaty in 2001. With the changes made, the EU sought to achieve better coherence and greater institutional strength.

### **Contractual and legal regulation of the CFSP**

With the entry of the Treaty of Amsterdam into force in 1999, a more efficient decision-making process was established, providing for constructive abstention and qualified majority voting. Also at that time, the European Council created the position of High Representative for the CFSP, whose duties include the leadership of the EU’s foreign policy and diplomacy with third countries. In 2003, the Treaty of Nice introduced further changes to streamline the decision-making process and gave a mandate to the Political and Security Committee (PSC), established by a Council decision in January 2001, to carry out political control and strategic direction of crisis management operations.

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<sup>14</sup> Prof. Stephan Koeckeler, a specialist in the field of foreign policies and diplomacy, with extensive professional experience, worked in the office of the Belgian Minister of Foreign Affairs and in the EP. His research is related to EU foreign policy, and in particular to the CFSP, the EU foreign policy structure and EU diplomacy.



The principles and objectives of the European Council, collected in the “European Security Strategy”, were presented in 2003. In this document, for the first time, the main threats to the security of the EU were outlined and the main strategic objectives were listed. The potential regional conflicts, organized crime, and terrorism are identified as the main threats to the Community. This strategy offers coordination in the implementation of policies to address these issues through regulated parameters and democratic governance.

After the changes that occurred on the global scene in 2015, the European Council tasked the EU High Representative to further develop the Union’s foreign policy strategy in the dynamically changing situation. At that time, the post of HR was held by the Italian politician Federica Mogherini, who drafted the “Global Strategy for EU Foreign Policy” in 2016. By identifying the main threats related to climate change, terrorism and tension in the Middle East, Mogherini’s Strategy aimed at security and peacekeeping in Europe. Implementation is carried out using integrated approaches to conflicts; the safety of citizens is a primary objective in these approaches<sup>15</sup>. In 2020, the European Commission<sup>16</sup> presented the new EU Security Strategy<sup>17</sup>. This new initiative, scheduled for 2025, aims to protect and promote the way of life in the EU. In the strategy, the mechanisms and tools for improving Europe’s security are developed based on four pillars: a sustainable security environment over time; dealing with changing threats; protecting all European citizens against organized crime and terrorism; and creating a stable security ecosystem<sup>18</sup>. Impressively, the strategy focuses entirely on the European space, and for the first time in the history of the EU, the European Commission is made responsible for enhancing security.

The most recent changes to the CFSP were made with the Lisbon Treaty<sup>19</sup>, which completely removed the three pillars of Maastricht. Another consequential change was the renaming of the European Security and Defense Policy (ESDP) as the Common Security and Defense Policy (CSDP). The other significant change introduced by this treaty was the legal status of the Union, which allows the EU to be independent vis-à-vis third countries. The European External Action Service<sup>20</sup> (EEAS) was also established, uniting and managing EU diplomatic relations. Another significant

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<sup>15</sup> Global Strategy for EU Foreign Policy, 2016, June, eugs\_review\_web\_0.pdf (europa.eu).

<sup>16</sup> The EC is made up of 27 commissioners, one from each country. It is the body responsible for proposing laws, allocating European funds and representing the EU internationally to third countries.

<sup>17</sup> EU Security Union Strategy, IMMC.COM%282020%29605%20final.ENG.xhtml.1\_EN\_ACT\_part1\_v7.docx (europa.eu)

<sup>18</sup> Ibid.

<sup>19</sup> The Treaty of Lisbon was signed on 13 December 2007 but entered into force on 1 December 2009.

<sup>20</sup> It supports the work of the High Representative and coordinates the work of EU diplomatic delegations around the world. It is responsible for cooperation with third countries and for the consolidation of peace and security through CSDP management. The main goal is the transformation of the EU’s foreign policy into a coherent and integrated instrument that strengthens the EU on the international stage.

change was the inclusion of the solidarity clause and the assignment of foreign policy powers and budgetary control to the European Parliament.

Ultimately, through the series of treaties between countries, the European Union has built a political system common to all countries, including common legislation, common procedures, and institutions. Regarding the decision-making policies in the area of foreign policy, the EU exercises supranational authority through the principle of qualified majority in decision-making<sup>21</sup>.

The main principles guiding European foreign policy are described in the Treaty on European Union<sup>22</sup> (TEU) of 1993; and the provisions regarding external action, in the Treaty on the Functioning of the European Union (TFEU). In the mentioned treaties, European foreign policy is divided as follows: Title V of Section 2 of Chapter 2 with Articles 21-46 of the TEU includes the areas covering the Common Security and Defense Policy; Section V of the TFEU, Art. 205-222, covers foreign economic relations, including international trade and contracts, cooperation, and development. The guiding principles of foreign policy are listed in Article 21 TEU: The actions of the Union on the international scene will be based on the principles laid down at its creation: democracy, rule of law, universality and indivisibility of human rights and fundamental freedoms, equality and solidarity<sup>23</sup>. Art. 22 regulates the procedures related to foreign policy and the role of the European Council, responsible for the strategic goals and interests of the EU<sup>24</sup>. The Treaty also introduced the offices of President of the European Council, President of the Commission, and High Representative of the Union for Foreign Affairs and Security Policy. Article 27 regulates the European External Action Service, whose task is to support the work of the High Representative<sup>25</sup>, in cooperation with the diplomatic services of the member states.

I must note that the EEAS officially came into effect on January 1, 2011. The duties of the High Representative of the CFSP are regulated in Article 27 of the Treaty on the European Union<sup>26</sup>:

1. The High Representative of the Union for Foreign Affairs and Security Policy, representing the Foreign Affairs Council, contributes with his proposals to the development of the common foreign and security policy and ensures the implementation of the decisions adopted by the European Council and the Council.

2. The High Representative shall represent the Union in matters relating to the common foreign and security policy. It conducts the political dialogue with third

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<sup>21</sup> Foreign policy: aims, instruments and achievements | Fact Sheets on the European Union | European Parliament (europa.eu)

<sup>22</sup> The TEU, one of the main treaties of the EU, lays the foundation of the legal system, the objectives and the functioning of the main institutions of the EU.

<sup>23</sup> TEU, Article 21, C\_2016202EN.01000101.xml (europa.eu)

<sup>24</sup> Ibid., Article 22

<sup>25</sup> Ibid., Article 27

<sup>26</sup> Ibid., Article 27

countries on behalf of the Union and expresses the Union's position in international organizations as well as at international conferences.

3. In the performance of his functions, the High Representative shall be assisted by the European External Action Service. This service works in cooperation with the diplomatic services of the Member States and includes officials from the competent services of the General Secretariat of the Council and the Commission, as well as seconded staff from national diplomatic services. The organization and functioning of the European External Action Service shall be determined by a decision of the Council. The Council acts on a proposal from the High Representative after consultation with the European Parliament and after approval by the Commission.

With the entry into effect of the Lisbon Treaty in 2009, further cardinal changes were introduced in the CFSP. The Treaty establishing the European Community was reformed and renamed the Treaty on the Functioning of the European Union, which represents the legal basis of the EU; as such, it defines the principles and objectives of the policy and the Union's internal and external activities<sup>27</sup>. Thus, the CFSP is regulated under both treaties. With Declaration 15<sup>28</sup> under Article 27 of the EO of the Intergovernmental Conference, it was decided that, the organization of the establishment of the European External Action Service should come into effect after the signing of the Treaty of Lisbon.

A 2009 European Commission on Constitutional Affairs report on the EEAS stated that the External Action Service represents an extension of Community law in the field of the Union's external relations and the unification of diplomatic missions under the single leadership of the High Representative. The process of establishing the EEAS is itself extremely complex and requires a great deal of coordination. On March 25, 2010, the High Representative presented to the Council of the EU a proposal related to the functioning and organization of the office<sup>29</sup>. According to the project, it is an autonomous body that aims to build a stable economic and political influence of the EU internationally. Through it, the Union must achieve better coherence in the various areas of its external action. Thus, a few months later, on July 26 of the same year, the EEAS was finally established by a „Council Decision“. The main objective of the EEAS is to be a working tool supporting the leadership of the High Representative at the CFSP. One of the most important tasks of the European office is to ensure the coherence of external relations. I should clarify that the European Commission and the EEAS consult on foreign policy matters, except on those related to the CSDP, which are in the competence of the Council. To implement its ideas as an autonomous body, the EEAS is divided into two units: a central administration in Brussels and numerous delegations. Apart from the directorates-general, the central administration of the EEAS has various services working in different areas:

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<sup>27</sup> Treaty on the Functioning of the European Union C\_2016202EN.01000101.xml (europa.eu)

<sup>28</sup> Ibid.

<sup>29</sup> Concil Decision of 26 July 2010, Council Decision of 26 July 2010 establishing the organisation and functioning of the European External Action Service (europa.eu)

strategic planning; legal services; diplomacy; internal inspections, and auditing. As regards structural units in third countries, the decision to open or close a delegation is taken by consensus by the High Representative together with the Council and the Commission. The powers of the executive body of the EEAS - the General Secretary include the monitoring of the work of each delegation by administrative and financial audits. With the implementation of the Lisbon Treaty, the delegations retain their powers and continue to function as “peripheral structures”.

Each EU delegation covers the needs of the European Council, the Council of the EU, the European Parliament, and the Commission, and the head of each has authority over the staff and ensures coordination and control over the activities carried out, for which he is accountable (responsible) to the High Representative. Also under the powers conferred by the various Treaties, the Commission has the power to give instructions to delegations, to be fulfilled under the responsibility of the Head of Delegation. Unlike the central administration of the EEAS, employees in the external structure are periodically assigned to delegations.

The Council Decision of 26 July 2010, which defines the functions and activities of the EEAS, includes a list of all offices of the General Secretariat of the Council and the Commission that are transferred to the EEAS. The purpose of this change is to avoid duplication of the functions of the different departments of the EEAS and their budgetary costs. Thus, each occupation of an official position and entry into the EEAS takes place under the leadership of the High Representative. All transfers from the former DG of External Relations, together with seconded staff, are transferred to the Office for External Action.

In addition to the main duty of this Office to support the work of the High Representative, it assists and supports the activities of all agencies, bodies, and institutions of the Union in the field of foreign policy, thereby ensuring better coherence of actions in this area. Of course, this cooperation is a bilateral process in which, in particular, the EEAS will support the work of the General Secretariat of the Council of the EU, the European Parliament, the President of the European Council, and the President of the Commission. The EEAS and the Commission consult each other on all matters related to the Union’s external action, except those of Common Security and Defense Policy (CSDP); this means that when the Commission issues instructions to a delegation, a copy of these instructions will be sent to the EEAS. Every year, the High Representative must report to the Council and the Parliament the official employment of the permanent staff of the EU and the diplomatic services of the Member States. In addition, debates are held twice a year related to progress in foreign policy development, including common security and defense policy. The Office has an important commitment to cooperation with national diplomatic units. The High Representative coordinates the EU’s external action and fulfills his mission with the help of the instruments listed below: European Regional Development Fund<sup>30</sup>.

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<sup>30</sup> European Regional Development Fund, European Regional Development Fund (ERDF)  
| Fact Sheets on the European Union | European Parliament (europa.eu)

As an acting authority, the EEAS exercises its budgetary powers on the basis of the Financial Regulation applicable to the general budget of the EU. With respect to the budget, the High Representative is responsible for the appointment of the Director-General dealing with the budgetary and internal administration of the EEAS. The High Representative commits to cooperate with the budget authority<sup>31</sup> and the Audit Chamber. As an administrative institution, the EEAS has its own Union budget, the management procedure of which is similar to that of the Commission.

### **The EU as an international organization**

In conclusion, it should be noted that EEAS works in the interest of both the EU and the Member States. The creation of the EEAS was the EU's first step towards a global and coherent foreign policy with its diplomatic service. The EU's relations with its neighboring countries are the main factor of stability and therefore their relations are regulated by special policies. Relations with the countries of the so-called BRICS<sup>32</sup> group are particularly important. The policies towards the countries in the immediate neighborhood of the EU, as well as relations with Russia, China, India, etc. establish the Union as a competitive player at the global level. Another important partner is the USA, with whom the EU conducts its policy through permanent delegations. Changes discussed above, as reflected in the various treaties, are a key factor to be considered in analyzing the EU's foreign policy. To fully analyze the EU's external relations, it is very important to understand how the EU functions in terms of the institutions responsible for managing foreign policy. Based on the CFSP and the Common Security and Defense Policy (CSDP), the EU's foreign policy is becoming multi-level governance<sup>33</sup>. "The competence of the Union in the field of common foreign and security policy covers all areas of foreign policy, as well as all matters related to the security of the Union, including the gradual formation of a common defense policy, which can develop into a common defense"<sup>34</sup>.

In order to maintain its leading role and uphold and realize its vision for a sustainable future, the EU "must shape its CFSP based on the following six actions":

- protection of a rules-based international order based on the principles and commitments enshrined in the UN Charter, the Helsinki Final Act, and the Paris Charter for a New Europe;
- taking the lead in strengthening multilateral partnerships on global priorities, in particular the partnership with the United Nations, and in protecting and promoting democracy and human rights worldwide;

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<sup>31</sup> These are the European Parliament and the Council of Europe.

<sup>32</sup> This abbreviation is used to designate the emerging national economies at the beginning of the 21st century: Brazil, Russia, India, China and South Africa. BRICS Wikipedia (wikipedia.org)

<sup>33</sup> Common Security and Defense Policy (europa.eu)

<sup>34</sup> Official Journal of the European Union, C 202, 7 June 2016, EUR-Lex - C:2016:202:TOC - EN - EUR-Lex (europa.eu)

- improving visibility and decision-making in the EU and making full and more effective use of EU hard and soft power instruments, including through the introduction of qualified majority voting in EU foreign policy decision-making;
- achieving European sovereignty by consistently interlinking the EU's external activities and internal policies, combining the ability to act independently, if necessary, with the willingness to pursue strategic solidarity with like-minded partners;
- further development of regional strategies, including diplomatic and economic engagement and security cooperation;

Following the international events of recent years, and as a result of the rapidly changing geopolitical environment, the annual resolution of the European Parliament related to the implementation of the CFSP focuses on the development of an EU security and defense doctrine, using the existing situation as an impulse for the strategic autonomy of the Union.

According to the proposal for the so-called Strategic Compass<sup>35</sup> for EU Autonomy, the Union must have a sustainable internal and external policy to ensure stability in today's unpredictable environment in relations both with neighboring countries and with more distant regions. The challenges that have occurred have "accelerated existing trends affecting the most important aspects of the EU CFSP and reveal the Union's vulnerability to external events"<sup>36</sup>.

An important step to improve EU policies is the so-called "European citizens' initiatives"<sup>37</sup>, a new form of cooperation. The Resolution of 17 February 2022 notes that "the current Conference on the Future of Europe provides an appropriate framework for formulating innovative proposals in this regard and calls for it to be more ambitious in the external dimension of EU policies"<sup>38</sup>. Considering „the comments received so far through the Conference on the Future of Europe's digital platform, the vast majority of European citizens support a stronger EU role and a common European approach to foreign and security policy and wish to see a coherent and an effective EU<sup>39</sup> foreign and security policy“. The reported heightened interest and active citizen participation are testimony to the right direction of policies to put Europe at the center of debates. The conclusions of the Conference are an important request and „road map“ for a fairer and more social future on the continent.

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<sup>35</sup> The Strategic Compass, adopted in 2021, is a political blueprint for action with regard to European security and defense in the next decade.

<sup>36</sup> Point B of the European Parliament Resolution of 17 February 2022, on the implementation of the CFSP: Texts adopted - Implementation of the Common Foreign and Security Policy - Annual Report 2021 - Thursday 17 February 2022 (europa.eu)

<sup>37</sup> European Citizens' Initiative (europa.eu)

<sup>38</sup> Point 24 of the European Parliament Resolution of 17 February 2022 on the implementation of the CFSP: Texts adopted - Implementation of the common foreign and security policy - Annual report 2021 - Thursday 17 February 2022 (europa.eu)

<sup>39</sup> Point 24 of the European Parliament Resolution of 17 February 2022 on the implementation of the CFSP: Texts adopted - Implementation of the common foreign and security policy - Annual report 2021 - Thursday 17 February 2022 (europa.eu)

An integral part of the CFSP includes the Common Security and Defense Policy (CSDP) through which the Community regulates its security and defense policy and protects its citizens. Since 2003, after the first interventions in the Western Balkans, the EU has successfully conducted 37 operations and missions on three continents. By March 2022, seven military and 11 civilian missions had been launched within the framework of the CSDP, the military and civilian participation of which numbered about 4,000 people. The most recent operations and missions were those in support of security in the Central African Republic (EUAM RCA) and the imposition of a UN arms embargo on Libya (EUNAVFOR MED IRINI), which contributed to the stabilization of the Cabo Delgado region (EUTM Mozambique).

EU decisions to deploy missions or operations are usually taken at the request of the partner country and/or based on a UN Security Council resolution. Under the CFSP, the Union has taken decisive action in relations with third countries over the past years. Political relations with Russia have been severely affected as a result of the conflict in Ukraine and the illegal annexation of Crimea. These events have led to the termination of some of the cooperation mechanisms. Relations with China have been unstable in recent years. In this regard, the EU aims to build a flexible approach to protecting its interests and values. These actions and policies are regulated by the “Elements for a New EU China Strategy” and the “EU-China Strategic Outlook”. The two sides reached an agreement in December 2020. The EU is stepping up its foreign and security policy engagement with China, promoting diplomatic relations and international security. In addition, both China and the EU are working together on a wider range of economic issues, including the promotion of innovation.

The EU’s long-standing economic partnership with the US is marked by a shared responsibility to promote common values such as peace, freedom, and democracy, support economic development, and support and protect human rights worldwide. As the most important driver of world economic growth and trade, the EU and the US account for 42% of the world’s gross domestic product in trade in goods and services. Despite common values, the EU and the US also have different positions on specific issues regarding environmental and climate protection, and on relations with China and other countries.

## **Conclusion**

Although international relations have been the main topic of discussion between the founding states and seem to have been an important priority as early as 1957, the development and ratification of the CSPE has been a difficult process, developing at different speeds over the years; thus, the EU is still unable to speak with one voice on foreign policy issues. It was after the Treaty of Lisbon that the Union built a developed international diplomatic network; several specific bodies were created and an institutional structure that did not exist before was established. The implementation of the EEAS represents the first step towards a coherent and global EU foreign policy. With its normative vision, the CFSP aims to homogenize the positions of the member

states related to transnational challenges and potential threats. Despite these attempts to strengthen the CFSP and the development of different foreign policy strategies, practice has revealed instability and vulnerability in case-solving, which prevents the implementation of a unified policy and speaking with one voice on international issues by all EU member states. On the other hand, as evidenced by the experience of the European citizens' initiatives, Europeans themselves wish for a stronger role in the EU and a common European approach to foreign policy and security policy issues. The citizens of the EU demand a more consistent and effective foreign and security policy from the EU. In the conditions of the dynamically changing geopolitical situation, it is obvious that the EU needs to develop; above all, it must implement a complex approach to dealing with the whole range of new challenges.

### **List of abbreviations**

**AEFT:** European Parliament's Foreign Affairs Committee

**CFSP:** Common Foreign and Security Policy

**CSDP:** Common Security and Defense Policy

**ECSC:** The European Coal and Steel Community

**EDC:** European Defense Community

**EEA:** The Single European Act EEA

**EEAS:** European External Action Service

**EEC:** European Economic Community

**EPC:** European Political Cooperation

**ERDF:** European Regional Development Fund

**ESDP:** European Security and Defense Policy

**EU:** European Union

**IO:** International organization

**PSC:** Political and Security Committee

**UN:** Charter of the United Nations

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***About the author:*** Diana Petrova is a research assistant at the Institute of Philosophy and Sociology - BAS. She holds a PhD in Philosophy and a Master's degree in European Public Administration. As a young researcher she is a team member of the IPS-BAS team of the project "European Foreign Policy Facing New Challenges and Perspectives: The View of Young People in Bulgaria", financed by the Bulgarian National Science Fund at the Ministry of Education and Science (Contract № KP-06-KOST/3).

# The Role of the Single Market for the European Economy and the Future of Europe

Ani Dimitrova

**Abstract:** *The Single Market of the EU largely contributes to the prosperity and integration of the economies of Europe by stimulating growth and competition in creating new opportunities for enterprises through access to the internal market. It is the basic economic engine of the Union, which is comparable to the largest commercial blocs in the world: the EU produces 18% of the world GDP (for comparison, the US produces 24% and China 18%), thanks to close coordination between the member states and the economic policy. The European Commission manages the Single Market, being responsible for monitoring the implementation of EU law and taking action in case of violation of the Single Market Act; and for collecting data to appraise the application of policies and estimate the areas in which policies need to be developed. Shared competence between the Union and the member states is the basis of various policies that make the Single Market the engine of sustainability in the EU, enabling the Union to deal and manage crises in the short term and address strategic dependencies and the need for capacity development in the long term.*

**Keywords:** Single Market, EU, economy, competition, growth, Europe.

In 2023, the 30<sup>th</sup> anniversary of the creation of the Single Market has been an occasion for taking stock of the Market's path of development over these three decades but also for appraising its prospects with regard to the European economy and the development of Europe in the coming years. It may definitely be said that the Single Market is one of the greatest achievements of the EU; that it has stimulated economic growth and has facilitated the life of European enterprises and consumers. Because the importance of the Single Market for the future of Europe and its economy has been clearly recognized, a new package for industrial policy, with a new industrial strategy for Europe, has been developed. The basis of this new strategy is the EU's green and digital transition, seen as the driving force of competitiveness, growth and recovery from the crises caused by the COVID-19 pandemic and the war in Ukraine. These two crises have accelerated the measures taken to enhance the resilience of the Single Market against disruptions, to adopt measures related to the strategic, technological and industrial dependencies of the EU, and to accelerate the digital and green transition in industry. These crises have revealed the need for a well-functioning Single Market and for the EU to strengthen its strategic autonomy in order to ensure the safety of its supply chain and reduce external dependencies, while at the same time maintaining the openness of its economy.

It is not coincidental that in April 2021 the Council of Europe and the European Parliament adopted the Single Market Program for the EU 2021 – 2027, which aims to enhance the effectiveness of the Single Market, increase support for the competitive capacity of EU enterprises, particularly small and middle enterprises (SME), facilitate the development of effective European standards, provide opportunities and protection for consumers, ensure a sustainable and safe food chain. All members of the Single Market are clearly aware of its key importance for the development of Europe and for consolidating relations between countries and strengthening the EU as a union of values. Today, the European single market, internal market or common market is a unified market comprising the 27 EU member states, as well as Iceland, Lichtenstein and Norway (through the Agreement for the European Economic Area) and Switzerland (through sector agreements). The first three states, Iceland, Lichtenstein and Norway, are involved through economic decisions of the EU related to its single market but not by EU decisions. Switzerland at first signed an agreement for the EEA but later decided not to participate.

It is a revealing fact that, whereas in 1992 approximately 345 million persons in 12 countries of the EU initiated the Single Market of the European Union as a space without internal borders, in which people, goods, services and capital may travel freely, today, despite the exit of Great Britain, the Single Market now comprises over 450 million consumers and is stimulating growth and competition, creating new possibilities for enterprises in the EU by providing them access to its internal market. It may categorically be said that it is the main economic motor of the Union and its 27 member states. Especially as today the Single European Market is one of the largest commercial blocs in the world: the EU accounts for 18 percent of the world GDP (the US, for 24%, and China for 18%). According to recent estimations, the Single Market provides considerable economic benefits: an average 8% to 9% higher GDP for the EU<sup>1</sup>. That is why we should share the appraisal of a number of authors that “the history of the Single Market is remarkable: after the stagflation of the 1980s, the Single European Act and then the Maastricht Treaty gave new impetus to European economic integration. Since then, the Single Market led to harmonization of hundreds of products and established minimal standards for the protection of consumers in the EU”<sup>2</sup>.

This is true; the Common Market, created by the Treaty of Rome in 1958, aimed to abolish the obstacles to commercial exchange between the member states in order to increase the economic prosperity and attain “every closer union between the nations

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<sup>1</sup> 30 years of single market - Taking Stock and Looking Ahead- [https://single-market-economy.ec.europa.eu/publications/30-years-single-market-taking-stock-and-looking-ahead\\_en](https://single-market-economy.ec.europa.eu/publications/30-years-single-market-taking-stock-and-looking-ahead_en)  
J. in't Veld (2019). See also e.g. G. Mion, D. Ponattu (2019); G. Felbermayr, J. Gröschl, I. Heiland (2022); EPRS (2022)

<sup>2</sup> <https://trud.bg/%D>

of Europe”. It is a fact that the internal market greatly contributes to the prosperity and economic integration of the EU. The strategy for the internal market during the period 2003 - 2010 was to concentrate on the need to facilitate the free movement of goods, to integrate the services market, to reduce the effect of tax barriers and to simplify the regulation environment, achieving considerable progress in the liberalization of services in transport, telecommunications, the energy industry, the supply of gas and postal services. But after the European Commission published in 2010 a communication entitled “Towards a Single Market Act”<sup>3</sup>, the focus changed. Now the aim was to give a new impetus to the single market through a package of measures for promoting the economy of the EU and creating jobs by applying a more ambitious policy for economic development. In order to develop the single market and exploit its untapped potential as a motor of growth, in October 2012, the European Commission presented the Single Market Act II<sup>4</sup>. This law formulated twelve basic actions that EU institutions should adopt in a very short term. These are centered on four basic drivers of growth, employment and confidence: 1) integrated networks, 2) cross-border mobility of citizens and businesses, 3) digital economy, and 4) actions for strengthening cohesion and enhancing the benefits for consumers. Aimed in the same direction was the Directive (EU) 2019/633, adopted on April 17, 2019, on the prohibition of unfair practices and improving the existing practices of the internal market.

Based on awareness of the need for digital transition as an engine of competitive ability and growth, the European Commission adopted a special digital single market strategy for Europe. As part of the path towards a successful digital economy, the Commission adopted it in 2015 in response to the concern of European governments regarding the regulation of the digital markets<sup>5</sup>; the strategy defines the single market as “one in which the free movement of goods, people, services and capital is guaranteed, and where persons and enterprises may access and exercise online activities under conditions of fair competition and a high level of security for consumers and personal data, regardless of nationality or place of residence” (European Commission, 2015). In view of building the European digital economy, in 2019, Ursula von der Leyen, President of the European Commission, presented “My Programme for Europe”<sup>6</sup>, in which she placed the task of strengthening the digital single market at the center of all fields of activity. This commitment was renewed in the Commission’s strategic document “Shaping Europe’s Digital Future”, dating from February 2020, which outlines the way to build up the digital single market – by creating a single market for data and by ensuring equitable conditions for online and offline competition through a coordinated normative regulation. This was after the COVID-19 crisis and the war in Ukraine had shown

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<sup>3</sup> European Commission (COM(2010)0608).

<sup>4</sup> European Commission COM(2012)0573.

<sup>5</sup> European Commission (2015), Szczepanski (2015)

<sup>6</sup> [https://eea.government.bg/bg/politicalguidelinesnextcommission\\_bg\\_1.pdf](https://eea.government.bg/bg/politicalguidelinesnextcommission_bg_1.pdf): 9ff

that the digitalization of the single market plays a key role for the recovery of the EU, which should be based on 1) investments in better connectivity; 2) stronger industrial and technological presence in the strategic parts of the supply chain (for instance, artificial intelligence, cybersecurity, infrastructure for cloud computer servicing, 5G); 3) an authentic economy based on data and common European data spaces; and 4) a fairer and easier business environment ..<sup>7</sup> It is expected that the Digital Services Act and the Digital Markets Act will revolutionize the development of the digital single market in the coming years. Thanks to the legislation passed by the European Parliament regarding the digital single market, 177 billion euros are provided annually for economic growth in the EU. According to a study (Marcus et. al 2019) published in 2019, the most important benefits of European legislation for the EU were in the field of electronic communication and services (86.1 billion EUR), data streaming and artificial intelligence (51.6 billion EUR), the single digital gateway (20 billion EUR), as well as from the Regulation prohibiting blocking on geographical principles and the regulations for online gateways (14 billion EUR). Thus, one of the main goals of the European Commission is to shape Europe's digital future, empowering all citizens in terms of digital possibilities (European Commission, 2020a), which make the Single Market a secure gateway that applies the same standards for online and offline purchases, ensuring safe online gateways, better consumer protection and fair competition between traders<sup>8</sup>. The transition from a European Single Market to a digital single market has been a basic point on the political agenda during the last decade (Schmidt and Krimmer, 2022). Iansiti and Richards (2020) point out that the COVID-19 crisis gave people a horrifying sense of how the digital divide may continue to develop. That is why Europe should fight against it in using the correct strategies and methods to identify and remedy the existing digital gaps. As Mansour points out (2022), governments should be leaders of change, not reactive agents. Just as Europe is developing and changing, so, too, is the development of the Single Market a continuous process that must respond to a constantly changing world in which economic, social and demographic changes, challenges and restrictions, the new technologies, the exhaustion of natural resources and climate change, shape a new political thinking.

The Single Market has become an economic force that, thanks to its nature and evolution<sup>9</sup>, is capable of competing on a global scale more effectively than its component states could separately by themselves. It is exceptionally important that the Single Market ensures the free movement of goods, services, people and capital (known as the “four freedoms”) within the EU. The aim of the EU is to enable its

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<sup>7</sup> <https://www.europarl.europa.eu/factsheets/bg/sheet/33/>

<sup>8</sup> <https://www.ecc.bg/bg/blog/article/edinniyat-evropeyski-pazar-na-25-godini-kakvi-sa-polzite>

<sup>9</sup> [https://ebox.nbu.bg/eun/view\\_lesson.php?id=197](https://ebox.nbu.bg/eun/view_lesson.php?id=197)

citizens to study, live, shop, work, retire, and develop businesses, in any county of the Union, as well as to use products from all over Europe; this should be effectuated through the internal market of the EU, which is a single market.

The Single Market is the leading achievement in the process of European integration in terms of ensuring the “four freedoms” throughout the Union (Ringa and Spendzharova, 2022). Still, 30 years after the creation of the Single Market, important markets, such as those of financial services, energy industry and transport, are still mostly national, and the rules, standards and practices of e-commerce differ considerably across the member states. That is why it may be assumed that Hawarth and Sadeh’s (2010: 925) observation, made more than ten years ago, that the enlargement of the EU to Central and Eastern Europe only increases the degree of differentiation within the Single Market, is still topical today. In fact, the European Commission mainly uses enlargement to the Southeastern region as a way to encourage rapid liberalization and opening of the market. But, especially after the war in Ukraine, the effort to expand the scope and pace of integration of the Single Market has been expanded to new policy areas, such as energy industry and defense, for which the member states have traditionally preferred national markets to cross-border ones<sup>10</sup>. An example is the development of a single market for energy. In order for the internal EU market to be complete in the energy sector, it is necessary to abolish many obstacles and trade barriers, to achieve cohesion of tax and price policies, to include measures for norms and standards and to design a regulation for the environment and safety. Only thus can we achieve a functioning market to which people have fair access and that provides a high level of consumer safety and adequate levels of mutual connection and production capacity. Due to the energy crisis resulting from the war in Ukraine, and in the context of insecurity of energy supply, high prices and misbalances on the energy market, the EU countries have united and closely coordinated measures addressing all these problems. The countries are working together: to limit the excessively high prices of gas; to improve solidarity and shared supplying; to decrease energy costs for households and enterprises; to limit the energy dependence of the EU; to ensure the supply of gas; to accelerate the energy transition.<sup>11</sup> Thus, the EU countries came to an agreement, in effect since 15 February 2023, on the automatic activation of a mechanism to correct the market so as to reduce excessive gas prices in the EU and decrease the effect of rising prices on citizens and the economy. Ceiling prices have been applied for gas deals when gas prices reach exceptional levels. The leaders of the 27 member states have jointly decided to abolish the dependence of the EU on Russian fossil fuels in the context of the war in Ukraine and EU climate goals for the year 2050. The Versailles Declaration was adopted at an informal meeting of state and government leaders in March 2022, where they agreed to gradually decrease import from Russia. One year later, in March 2023, the Council officially adopted an extension, by one year (up to 31 March

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<sup>10</sup> Camisã and Guimarães (2017); Genschel and Jachtenfuchs (2018); Mathieu (2020).

<sup>11</sup> <https://www.consilium.europa.eu/bg/policies/energy-prices-and-security-of-supply/>

2024), of the voluntary objective to reduce the demand for gas. This was after the EU countries agreed in August 2022 to reduce the total demand for gas in the EU by 15% (compared with the average consumption in the previous five years) in the period from August 2022 to March 2023. The decision was adopted with record-breaking speed – the Commission had presented its proposal only two weeks earlier. Another indicative fact with regard to achieving the goals of a common energy market is that an average 55% of filled gas supplies were attained by the EU in March 2023 (nearly twice the amount in March 2022).

Four energy packages have been activated so far. Debates are continuing as to the energy aspects of the fifth energy package, “Prepared for Goal 55”<sup>12</sup>, published on 14 July 2021, which aims to achieve correspondence between the energy goals of the EU and the new European ambitions in the field of climate for 2030 and 2050. One of the goals of energy market reforms is to protect consumers and to ensure that green energy, the share of which is growing, will be available at low prices and the markets will be protected from shock changes in prices. So far, however, not all EU countries are prepared to make a significant change in their energy markets. France, Spain and Greece insist on a deep transformation. According to various publications, Madrid insists that the reform should allow national regulators to conclude long-term contracts with producers of electricity at fixed prices.<sup>13</sup> Nevertheless, in the framework of its plan, the EU has created a voluntary energy gateway that supports coordinated shared purchases of energy from other EU countries and some European partners. On 29 September 2022, the EU ministers commended the eagerly expected tool for support of the single market in emergency situations. This contributed to fulfilling the goal of the Treaty on the Functioning of the European Union (TFEU). The Treaty clearly states that the Community aims to create a common market and an economic and monetary market by applying common policies or activities, indicated in articles 3 and 4, for promoting throughout the Community a harmonious, balanced and sustainable development of economic activities, a high level of employment and social protection, equality between men and women, sustainable non-inflationary growth, high competitive capacity and cohesion of economic results, a high level of protection and improvement of the quality of the environment, higher standard and quality of life, as well as stronger economic and social cohesion and solidarity between the member states<sup>14</sup>. That is why the Single Market has been increasingly open to competition, has created new jobs and eliminated many of the obstacles to trade<sup>15</sup>. It is clearly stated in the Treaty on European Union that the member states

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<sup>12</sup> <https://www.moew.government.bg/static/media/ups/tiny/VOP/FF55.pdf>

<sup>13</sup> <https://www.investor.bg/a/518-energetika/370175-ima-li-shans-za-reforma-na-energiyniya-pazar-v-es>

<sup>14</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:12002M/TXT&from=EN>

<sup>15</sup> [https://eur-lex.europa.eu/content/summaries/summary-24-expanded-content.html#arrow\\_2401](https://eur-lex.europa.eu/content/summaries/summary-24-expanded-content.html#arrow_2401)



must have a common trade policy; a common policy in the sphere of agriculture and fisheries; a common policy for transport; a system that ensures competition within the internal market; they must promote the cohesion of laws of the member states to the degree required for the functioning of a common market; and enhance the competitive capacity of industry in the Community<sup>16</sup>. It is clearly stated that all these goals must be achieved through an economic policy based on close coordination between the member states, and that the economic policies related to the internal market and the common goals must accord with the principles of an open market economy based on free competition. These goals include fixing exchange rates that lead to a single currency (the ecu, and now the euro) and the designing and implementation of a single monetary policy and exchange rate policy, whose main aim is to maintain price stability and to support the common economic policy in the Community in accordance with the principles of an open market economy with free competition. These activities of the member states and of the Community are based on compliance with a few basic principles: stable prices, stable public finance and monetary conditions, and a sustainable balance of payment.

### **On the Customs Union**

The Community has a customs union that encompasses all trade in goods and includes a prohibition on customs duties on import and export between the member states, and on all taxes that may have an equal effect; this applies to fiscal duties as well. The union also provides for the adoption of a common customs tariff in relation to third states. The duties under the Common Customs Tariff are voted by a qualified majority of the Council following a proposal by the Commission. It is assumed that the European Customs Union originated in 1968, when all duties and restrictions between the member states of the European Economic Community were abolished. The aim was to provide free movements of goods within the Union and to allow its members to work together as a unified whole. Although the Customs Union is administrated by the European Commission, its responsibilities are fulfilled by the national customs services of the member states. At the same time, the Commission is committed to work for avoiding distortions in the conditions of competition between member states with regard to finished goods, and the member states watch out for discrimination with regard to the conditions under which they supply one another goods. Customs officers of the EU deal with the logistics of goods imported into the EU. The size of this import is enormous and amounts to about 15% of the entire import in the world. In 2020, the value of the EU's trade with other countries amounted to 3.7 trillion euros.<sup>17</sup> There are fundamental differences between the Single Market

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<sup>16</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:12002M/TXT&from=EN>

<sup>17</sup> European Customs Union by Will Kenton, updated June 29, 2022, reviewed by Michelle P. Scott <https://www.investopedia.com/terms/e/european-customs-union.asp>

and the Customs Union. The Single Market is a trade agreement that abolishes trade regulations and tariffs between EU states and four countries that are not EU members but are members of the European Free Trade Association. It is possible for a country to be a member of the Single Market but not of the Customs Union, and vice versa. The Customs Union regulates international deals and import from countries outside the Union; while the focus of the Single Market is on free movement of workforce and on the conditions of work and standards of health and safety in the Union.

The Customs Union is essential to the correct functioning of the Single Market. Not only because it ensures the protection of the external borders of the EU but also because it protects the security and public order in European societies, the life and health of citizens, and industrial and intellectual property. In fact, the national customs services in all EU countries work together as one to govern the daily operations of the Customs Union. For its part, the EC proposes (and monitors the implementation of) customs legislation for the EU. This is very important for the development of the EU as one of the major trade blocs in the world. In managing the enormous volume of international trade, more than 1,900 customs officers in the EU processed the import, export or transit of 1.178 million articles in 2021. The size of the collected duties in that year attained 24.8 billion euros.<sup>18</sup>

In fact, the Single Market establishes a single trade territory which functions without the border regulations and tariffs usually applied to trade between countries. It thus permits the unlimited movement of goods and services as well as capital and people across its whole territory. Exceptionally impressive in relation to this was Jean-Claude Juncker's 2017 speech devoted to the Union. The then President of the EC reminded the leaders of the EU and the world that all nations in the EU had travelled a long road and had promised to build and complete together an Energy Union, a Security Union, a Capital Market Union, a Banking Union and a Digital Single Market. Juncker stated his firm belief that "the wind is back in Europe's sails" and must be used. These unions, he stated, are part of the future of a stronger, more united and democratic Europe "Because, in Mark Twain's words, years later we will be more disappointed about the things we didn't do than about those we did". In his speech, Juncker was more than clear about the agenda of the EU in the sphere of trade: "Yes, Europe is open for business. But there must be reciprocity"<sup>19</sup>. What did Juncker mean by these simple words? In fact he captured some very fine nuances in the common trade policy of the Union. The Union has been courted throughout the world and is one of the last great protectors of free trade. But its trade policy is also "hardening", coming closer to the more muscular French view about international trade, which requires "reciprocity" from partners like China. That is why Juncker was firm: "We must get what we give. Because trade is not something abstract, and Europe has al-

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<sup>18</sup> EU Customs Union – unique in the world - [https://taxation-customs.ec.europa.eu/customs-4/eu-customs-union-facts-and-figures/eu-customs-union-unique-world\\_bg](https://taxation-customs.ec.europa.eu/customs-4/eu-customs-union-facts-and-figures/eu-customs-union-unique-world_bg)

<sup>19</sup> Jean-Claude Juncker's State of the Union speech, annotated - <https://ig.ft.com/juncker-speech-annotated/>

ways been an attractive place to do business. Trade is not something abstract. Trade is about jobs, creating new opportunities for Europe's businesses big and small. Every additional €1 billion in exports supports 14,000 extra jobs in Europe. A successful single market is based on justice and solidarity. We usually associate solidarity with the right to work and the decent remuneration of work. That is why, in 2020, the EC launched a European Skills Agenda for Sustainable Competitiveness, Social Fairness and Resilience. The right to work is ensured in the member states by the TFEU. The aim of EU legislation to protect posted workers against unfair working conditions led to a review of the Directives for Posting Workers, aimed at strengthening the protection of workers and ensuring fair competition. The European Labor Authority (ELA) was created to help the member states and the Commission to apply the rules of labor mobility with regard to posted workers. ELA is already operating, one of its first tasks being to support the member states in providing information on posting and the rules of mobility as a whole.

### **On the Common Labor Market**

One of the four freedoms EU citizens have is the free movement of workers. It includes the right of workers to move and reside, the right of their family members to enter and reside and work in another member state, and enjoy equal treatment with the citizens of the respective member state. While the free movement of workers in the Union is guaranteed, there are limitations for government officials. The ELA fulfills the role of a specialized agency for the free movement of workers, including posted workers<sup>20</sup>. The freedom of movement of workers, one of the fundamental principles of the EU since its creation, was established by Art. 45 of the TFEU and is a basic right that complements the free movement of goods, capital and services in the Single Market. This article points out a worker has the right to accept offers of employment, to move freely within the territory of the country for this purpose, and to stay in that country under certain conditions. This freedom of movement requires eliminating all discrimination of workers in terms of work, remuneration and other working conditions. The posting of workers is of key importance for meeting the demand for qualified workers in the whole single market. Despite the many actions undertaken in the EU in the last 70 years to harmonize or mutually recognize professional qualifications, the member states, including Spain, Denmark, and Sweden, still maintain systems for licensing activities – for instance, with regard to jobs in plumbing or electricity services, which are very difficult for foreigners to get access to – often because of the requirements for apprenticeship. Heavy-machine operators

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<sup>20</sup> <https://www.europarl.europa.eu/factsheets/bg/sheet/41/>

often have to take additional steps in order to work in another member state. These are just a few examples in this respect.

Although the basic right to free movement of workers has been stipulated in various regulations and directives since the 1960s, the founding regulation for this movement (Regulation 1612/68<sup>21</sup>) and its additional directive on abolishing restrictions on movement and residing (Directive 68/360 of the Council<sup>22</sup>) have been updated several times. At present, the key provisions of the EU in this respect are Directive 2004/38/EU regarding the right of movement and residence, Regulation № 492/2011 on the free movement of workers and Regulation 2019/1149 for the creation of a European Labor Authority. The guarantee that the EU can do better in recruiting qualified workers from outside Europe could also help solve the problem of shortage of skilled workforce.

According to Eurostat data, in 2020 3.8 % of EU citizens of working age (20—64 years) were residing in an EU country other than that of which they are citizens, compared with 2.4 % in 2009. Also, 1.5 million cross-border workers and 3.7 million postings of workers were counted that year. The number of postings decreased in 2019 due to the restrictions related to the pandemic. Compared with 2019, the employment of persons who had moved decreased by 2.6 percentage points to 72.7 %, while the employment of non-mobile workers slightly decreased, by 0.5 percentage points, down to 73.3 %. The share of mobile EU citizens varies considerably across the member states: from 0.8 % for German citizens to 18.6 % for Romanian citizens.<sup>23</sup>

Former German chancellor Angela Merkel outlined the perspectives for the development of a common labor market as early as June 2012. She called for the creation of a single European labor market at a meeting with trade union leaders and business representatives in the castle of Messemberg, near Berlin.<sup>24</sup> Juncker's statement years later, was in the same sense. He said that workers must receive equal pay for the same work in the same place. That is why the Commission proposed new rules for posting workers. It should be certain that all EU rules for labor mobility are applied in a fair, simple and effective way by the new European authority for inspection and application of the law. He said it seemed absurd to have a new banking authority controlling banking standards but not to have a common labor authority ensuring justice on the single market.

The Report on the Single Market for 2023 confirms that the Market is a powerful driver for the creation of jobs, facilitates mobility and promotes overcoming

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<sup>21</sup> <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CONSLEG:1968R1612:20040430:BG:PDF>

<sup>22</sup> <https://op.europa.eu/bg/publication-detail/-/publication/c1621eee-60b3-4326-8220-851ed5e27798/language-en>

<sup>23</sup> <https://www.europarl.europa.eu/factsheets/bg/sheet/41/%D1%81%D0%B2%D0%BE%D0%B1%D0%BE%D0%B4%D0%BD%D0%BE-%D0%B4%D0%B2%D0%B8%D0%B6%D0%B5%D0%BD%D0%B8%D0%B5-%D0%BD%D0%B0-%D1%80%D0%B0%D0%B1%D0%BE%D1%82%D0%BD%D0%B8%D1%86%D0%B8>

<sup>24</sup> Merkel called for a single European labor market - <https://www.investor.bg/a/334-evropa/135547-merkel-prizova-za-edinen-evropeyski-trudov-pazar>

social inequalities. For instance, since 1997, the EU system for mutual recognition of professional qualifications has enabled over 800,000 people to settle in another member state. Recognition of qualifications is important for professional mobility and overcoming skills shortages. In 2019, no less than 77% of companies declared that they had difficulties in finding employees possessing the necessary skills.<sup>25</sup> Skills shortage is the most frequently mentioned obstacle to investments in the EU (85%)<sup>26</sup>. The shortage of qualified staff and experienced managers is the greatest problem for one fourth of small and medium enterprises in the EU, which amount to 99% of all enterprises in the Union<sup>27</sup>. This is also true for digital skills. More than half of all enterprises in the EU who have hired or tried to hire ICT specialists had difficulties in filling vacancies for ICT positions<sup>28</sup>. Skills shortages have a negative impact on the provision of goods and services, for instance in the production sector and in construction, energy industry and tourist ecosystems. Though unemployment was at an all-time low of 6% in 2022, competition for talents is more intense than ever. In 2021, labor shortages were registered in 28 professions, ranging from construction and healthcare to engineering and ICT. An indicative fact is that, according to the EC's calculations regarding the digital transformation, the need for investments in this sphere is 125 billion euros a year, while the analysis for the green transition shows that the necessary investments for reducing dependency to zero would amount to 300 billion euros up to 2030 (or 210 billion euros up to the end of 2027), in addition to the general investments in Fit-for-55.

The production industry continues to experience a severe shortage of skills, which delays the Single Market's growth and its innovations and competitiveness on the international market. This is particularly true for the small companies and for regions conducting the green-digital transformation of their production. While the demand for tourist services in 2021 reached the levels from before the pandemic, the shortage of staff has become prevalent and many providers have had to refuse reservations. At the same time, it is expected that the jobs in the sector of renewable energy will double, increasing to 2.7 million by the year 2050, and that 800,000 workers will have to be trained, promoted or retrained by 2025 in the battery sector alone; at least 400,000 more workers will be needed in the photo-voltaic sector of the EU by 2030. The decarbonization of European construction by the year 2050 will require training 3-4 million workers.

The workforce shortage and production costs are indicated to be the most urgent problems; unfortunately, they are increasing with time. In 2022 67% of the companies in the Eurozone considered the supply of workforce to be an exceptionally urgent problem, while 66% indicated as such the growing labor costs. Another important problem for small and medium enterprises is access to talents; for in this

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<sup>25</sup> Eurofound, European Company Survey 2019.

<sup>26</sup> EIB Investment Survey 2022

<sup>27</sup> Eurostat, Key Figures on European Businesses, 2022 Edition: 10

<sup>28</sup> Eurostat – European Union Survey on ICT Usage and eCommerce in Enterprises 2020

respect, they do not have the same resources as large companies. One fifth of MSEs indicated the lack of skills as an obstacle to more sustainable practices, digitalization and innovations. This is probably one of the reasons why the Commission designated 2023 as the European Year of Skills. In its political program for the digital decade, the Commission sets the goal of achieving basic digital skills for 80% of the population and attaining a figure of 20 million ICT specialists working in Europe by the year 2030. Education is also an important factor for labor force growth, even if the growth is based on migration; it should be noted that, thanks to the Single Market, 4.4 million students are studying in higher schools, 1.4 million persons are in youth exchange programs, 1.3 million are participating in VET schemes, 1.8 million are employees, 100,000 are volunteers and 100,000 are participants in the Erasmus Mundus program. In this context, the Commission carries on a structured dialogue with the member states regarding digital education and the mapping of the member states' current activity to identify potential gaps and to unite efforts within the EU. As a result of this, the Commission will publish two recommendations in 2023, one of which is about the favorable factors of digital education and the other, about the improvement of digital skills. As a result, among others, of the COVID-19 pandemic, in December 2021 the EC adopted proposals for improving the working conditions of people working through digital gateways, and published a communication on better working conditions for a strong social Europe and a proposal for a directive on improving the working conditions of gateway workers. The Single Market, including the single labor market, helps increase the sustainability of the economic and monetary union<sup>29</sup>. In the long run, the Single Market may play a central role as a gateway and business argument for the green transition and digital transformation of the economy and industry of the EU. The World Economic Forum has calculated that, by 2030, 70% of the new values created in world economy will be digitally activated, a trend that has been accelerated by the pandemic.

Based on the TFEU, all restrictions on movement of capital between the member states and between them and third states are prohibited. The Directive on Payment Services provides the necessary framework for the initiative of the European banking and payment services sector, called Single European Payment Zone (SEPA). The instruments of SEPA were available but were not widely used until the end of 2010. Based on the Investment Plan for Europe, in September 2015 the EC launched its leading initiative establishing a Capital Markets Union, which includes a number of measures aimed at creating a fully integrated single capital market. The European Parliament supported the creation of such a union. It adopted a resolution that stresses the need for establishing equal conditions for competition among all participants in order to improve the distribution of capital in the EU. The free movement of capital strengthens the Single Market and complements the other three freedoms. It also contributes to economic growth in allowing effective investment of capital, and is

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<sup>29</sup> Speech by M. Draghi, "Economic and monetary union: past and present" 19 September 2018, Berlin <https://www.ecb.europa.eu/press/key/date/2018/html/ecb.sp180919.en.html>

favorable to the use of the euro as an international currency, which also strengthens the international role of the EU. This freedom is necessary for the development of the Economic and Monetary Union (EMU) and for the introduction of the euro. The EMU includes coordinating economic and fiscal policies and establishing a common monetary policy and a common currency between the 20 states in the Eurozone. The decision to create EMU was adopted along with the TEU in the Dutch city of Maastricht in 1992. This happened after Jacques Delors, President of the EC, was asked in 1988 to convene an ad hoc committee of the managers of the central banks of the member states, who were to propose a concrete plan for further economic integration. The Delors Report was the basis of the Maastricht Treaty, which was the basis for the creation of the EU. One of the priorities of the Treaty was the economic policy and the cohesion of the economies of EU member states. The Treaty established a timetable for the creation and implementation of EMU. EMU had to include a common economic and monetary union, a central banking system and a common currency. The common currency was introduced ten years later, in 2002, finally replacing the national currencies in most EU member states. The adoption of the euro as currency prohibits monetary flexibility; thus, no state in the Eurozone can print its own money in order to pay state debts or deficits or compete with other European currencies. The European Central Bank (ECB), created in 1998, was responsible for price stability, and at the end of the year, the exchange rates between the currencies of the member states were fixed; this was a prelude to the creation of the European currency, which began to circulate in 2002.

### **The Banking Union**

The need for a banking union arose as a result of the financial crisis of 2008 and the state debt crisis that followed it. The Banking Union is an important step towards a real EMU. The crisis in the Eurozone led to deeper integration in areas closely related to the Single Market, such as the European Banking Union (EBU) and the economic management of the EU<sup>30</sup>. The EBU makes it possible for the banking rules in the EU to be applied consistently in the participating member states. The new instruments and decision-making procedures enable the creation of a more transparent, more unified, and safer banking market. The EBU has two main pillars: the Single Supervisory Mechanism (SSM) and the Single Resolution Mechanism (SRM). The foundation of the two pillars is the single rule book for all EU states.

The Banking Union was initiated in 2012 in response to the challenges and debt crisis in the Eurozone. It is an essential supplement to the EMU, its main task being to shift part of the authority of states to the banking sector at EU level. A stable EMU, in terms of finance and economy, attractive for non-participant member states, is the main tool for facilitating greater economic and financial stability, and

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<sup>30</sup> Bulmer and Quaglia (2018); Howarth and Verdun (2020); Voltolini, Natorski and Hay (2020); Zeitlin, Nicoli, and Laffan (2019).

thus promoting the goal of the EU to improve the life of European citizens. In June 2012, the European Council decided to move on from a mixture of different national regulatory frameworks for banks, to a banking union. This union consists of three parts: supervision of the participant banks, restructuring of the problematic banks, and ensuring the deposits of clients. In October 2017, the EC published a communication on the completion of the Banking Union<sup>31</sup>.

On April 2023, the EC adopted a proposal for correcting and further strengthening the existing EU framework for Crisis Management and Deposit Insurance (CMDI), which emphasizes medium and small banks. This reform was an important step forward to bolstering the second pillar of EMU and paving the way to its completion. The EC also published its second SSM report, which concluded that EMU was generally functioning well and had become a mature and functional supervisory authority. The EC presented a proposal for a European Deposit Insurance Scheme (EDIS) in November 2015 and, in November 2016, a banking package with additional measures for reducing risk. EDIS is of essential importance for the completion of the banking union, as it will ensure fuller and more unified insurance coverage for all small-scale depositors in the EMU regardless of their geographical location. Negotiations for these proposals, however, are continuing, and they have not been adopted by the European Parliament or the Council.

With regard to the SSM, the European Banking Authority (EBA) plays a decisive role for ensuring equal conditions throughout the EU. In fact, SSM will strengthen the EBA's capacity in this respect and its coordinating functions. The EBU brings benefits to citizens, making the banking sector safer for them; to banks, who enjoy a more consistent environment; and to governments, reducing their responsibility to bail out banks.

The EBU is not only a necessary supplement to the monetary union but also a means to establish the necessary institutions, rules and instruments for a single financial market. These instruments include the SSM and the SRM. Both mechanisms, in which Bulgaria is a participant, are now functioning. The SSM includes the ECB and the national supervisory authorities of the participant states. The SRM, supported by the Single Resolution Fund (SRF), has as its main goals to ensure effective restructuring of problematic banks with minimal expenditure for taxpayers and for the economy; and to ensure such quick procedures for decision-making, that a bank can be restructured over the weekend. Also, a single rulebook provides a single set of harmonized prudential rules that credit institutions must comply with on the Single Market. At the same time, the Banking Union can function only if risk reduction and risk sharing go hand in hand. A number of initiatives for this purpose are under negotiation by the European Parliament and the Council. The EBU play an important role for promoting the integration of the financial markets in Europe and the creation of an authentic European banking sector. This is one of the key elements of the EMU,

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<sup>31</sup> [https://ec.europa.eu/finance/docs/law/171011-communication-banking-union\\_en.pdf](https://ec.europa.eu/finance/docs/law/171011-communication-banking-union_en.pdf)



which is the basis of the common currency, considered a success story at many levels and the second strongest currency in the world. Back in 2013, the then member of the Executive Board of the ECB, Yves Mersch, stated categorically that the Banking Union could be strongly positive for the single market mainly along three channels: first, by encouraging greater trans-border bank integration; second, by increasing confidence in banks' balance sheets; third, by helping to break the bank-sovereign nexus<sup>32</sup>. With regard to the first channel, in the ideal case, for example, if a Spanish SME could not take out a loan at a reasonable interest rate from a Spanish bank, it would be able to do so from an Austrian bank. This is what a single capital market means. The banking union facilitates such procedures by creating single standards for banks throughout Europe. Every bank that is part of the SSM is now subject to supervision according to a single supervisory model, and uses the same template for accounting data.

Stronger supervision at EU level leads to greater security for consumers and investors. Undeniably, the Single Market stimulates competition and offers new possibilities for enterprises in need of funding from the capital markets, and also enabling them to be in some degree independent of bank funding.

The introduction of a single currency was likewise not detrimental to the Single Market, though it was a much more radical change than the creation of SSM. The ECB's project for a digital euro is also in an advanced stage. At the end of April 2023, Fabio Panetta, member of the Executive Board of the ECB, announced that the ECB was already in the last stage of the investigation phase of the digital euro project. The Executive Board of the ECB has already approved a set of variants for a digital euro design. A report has presented views of the Eurosystem as to how people may access, hold and begin to use the digital euro<sup>33</sup>. The Board's eventual decision to issue a digital euro will be made only after the respective legislative act is adopted. People will not be obliged to use the digital euro, but they should always have the possibility of using it as they do cash money, Panetta pointed out<sup>34</sup>. Clearly, the possibility of digital payment is important in a modern economy. Everyone in the

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<sup>32</sup> The single market and banking union- Speech by Yves Mersch, Member of the Executive Board of the ECB, European Forum Alpbach 2013 - <https://www.ecb.europa.eu/press/key/date/2013/html/sp130829.en.html>

<sup>33</sup> See ECB (2022), Progress on the investigation phase of a digital euro, September; ECB (2022), Progress on the investigation phase of a digital euro – second report, December; ECB (2023), Progress on the investigation phase of a digital euro – third report, April; and ECB (2022), Letter from Fabio Panetta to Ms. Irene Tinagli on progress reporting on the investigation phase of a digital euro, 14 June. The first report covers topics such as the transfer mechanism, privacy and tools to control the amount of digital euros in circulation. The second report focuses on the roles of intermediaries, a settlement model, funding and defunding and a distribution model for the digital euro. The third report covers the Eurosystem's views on accessing the digital euro, holdings, onboarding, distribution aspects, services and functionalities.

<sup>34</sup> A digital euro: widely available and easy to use. Introductory statement by Fabio Panetta, Member of the Executive Board of the ECB - [https://www.ecb.europa.eu/press/key/date/2023/html/ecb.sp230424\\_1~f44c7ac164.en.html](https://www.ecb.europa.eu/press/key/date/2023/html/ecb.sp230424_1~f44c7ac164.en.html)

Eurozone should be able to use it for daily payments: online, in a store or person-to-person. Unfortunately, at present there is no single European digital payment means universally adopted throughout the Eurozone. If adopted, the digital euro would be a public good and Europeans will expect to access it and use it everywhere in the Eurozone. Hence, it would be more convenient for all consumers if traders who accepted digital payments were obliged to accept the digital euro as a legal payment means. But this obligation for traders may be viewed as only a possible option.

### **On common legislation and the rule of law**

Adopting and complying with the final decision is to what it means to be part of a union based on the rule of law, the member states confer final jurisdiction on the Court of Justice of the European Communities. “The judgments of the Court must be respected by all. To undermine them or to undermine the independence of the national courts of justice is to deprive citizens of their basic rights. The rule of law is not an option in the European Union. It is obligatory. Our Union is not a state, but a community of law”, Juncker said back in 2017.

In my opinion, the joint decision-making procedure, introduced as early as 1992 is very important. With the adoption of the Lisbon Treaty, the joint decision-making procedure was renamed as a usual legislative procedure and became a basic procedure in adopting EU legislation. It is used in around 85 policy areas. The EC has the right to legislative initiative but the legislative authorities of the EU are the Council and the European Parliament. The EC submits proposals for legal acts of the EU at its own initiative, at the demand of other EU institutions, or based on a civic initiative. The Council (with a simple majority of its members) may request that the Commission investigate and present appropriate legislative proposals. The Parliament (by a majority of its members) may also ask the Commission to present legislative proposals. If the legislative proposal is rejected at any stage of the procedure, or if Parliament and the Council cannot reach a compromise, the proposal is not accepted and the procedure ends. This is stipulated in articles 289 and 294 of the TFEU.

The EC is the authority that regularly supervises compliance with the rules of the Single Market in all its dimensions. On 19 April 2023 came the news from Brussels that seven infringement proceedings had been opened against Bulgaria<sup>35</sup>. One of these concerned the rules for creating a Single European Railway Area. It is required of Bulgaria to comply with the rules for opening the market for domestic passenger transport services by rail and for the governance of the railway infrastructure; the rules allow railway companies to run all types of rail services anywhere in the EU. It is also required of Bulgaria to correctly transpose the EU rules for opening the market and the management of the railway infrastructure.

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<sup>35</sup> <https://dnes.dir.bg/politika/ek-dava-balgariya-na-sad-po-tri-sluchaya-i-predupredi-za-7-nakazatelni-protseduri>

The EC requires that Bulgaria follow the rules for applying a new version of the uniform template for residence permits for citizens of countries outside the EU. According to the Commission, Bulgaria had not introduced a new version of the template by the deadline 10 July 2020, a failure that may increase the possibility of document forgery.

Brussels requires of Bulgaria and nine other EU countries to transpose in a fully correct manner the provisions for seasonal workers. These rules ensure decent working and living conditions, equal rights and sufficient protection from exploitation for foreign workers; they may also reduce irregular migration.

The EC urged Bulgaria and four other EU countries to transpose EU rules on the internal electricity market<sup>36</sup>. Bulgaria had to indicate in a sufficiently clear way all the provisions of its national legislation by which it considered that the European rules in this area had been transposed. The deadline for legislative changes expired on 31 December 2020 and, as a result, considerable delays had accumulated in the connection of the national electricity markets. In my opinion, it should be clearly stated that the management of the EU displays weaknesses related to the complicated system of regulatory instruments for stimulating trans-border trade.

The other three infringement proceedings announced against Bulgaria on April 19 concern the EU rules on roadside inspections, the rules on port reception facilities for the collection of waste from ships, and the maritime spatial plans. The EU member states are expected to have a common approach to planning with regard to their maritime zones<sup>37</sup>.

## **The European Green Deal**

With the European Green Deal, which aims to make Europe the first climate-neutral continent by 2050, the EU has introduced a new framework for transforming the Single Market. In March 2022, the EC presented a legislative proposal for sustainable circle products. This includes reviewing the current directive on ecodesign that encompasses nearly all products on the EU market. The production requirements include: product durability, reusability, upgradability and reparability; possibilities for remanufacturing and recycling; energy and resource efficiency. The regulation envisages a “digital product passport” providing information on the products’ environmental sustainability. This should facilitate recycling and repairs and the tracking of dangerous products along the supply chain<sup>38</sup>. The Green Deal may be viewed as a stimulator of policies for restructuring investments.

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<sup>36</sup> [https://www.kas.de/documents/252038/253252/7\\_dokument\\_dok\\_pdf\\_35548\\_11.pdf/1b542064-f61d-63a8-402c-42bca6ee116f?version=1.0&t=1539655193648](https://www.kas.de/documents/252038/253252/7_dokument_dok_pdf_35548_11.pdf/1b542064-f61d-63a8-402c-42bca6ee116f?version=1.0&t=1539655193648)

<sup>37</sup> The European Commission announced several infringement proceedings against Bulgaria <https://bta.bg/bg/news/economy/443141-evropeyskata-komisiya-saobshti-za-nyakolko-na-kazatelni-protseduri-sreshu-balgar>

<sup>38</sup> <https://www.consilium.europa.eu/bg/policies/deeper-single-market/#programme>

This year's Single Market Report stresses that the new approaches, including better use of digital technologies and solutions for e-governance (for instance, a single digital gateway and a technical system based on the once-only principle), enhance trust between the authorities and reduce the burden for business and administrations. At the same time, the report emphasizes the need to increase the Single Market's effectiveness so as to ensure access to crucial goods, services, skills and capital needed for the digitalization of Europe and the construction of an environmentally relevant social and economic model. This need is based on the finding that the sustainability of supply chains must be increased, and strategic dependencies must be overcome, especially for basic raw materials, in order to enhance the integration of the services market and to ensure the technologies and skills needed to deal with these challenges. The "perfect storm" occasioned by the COVID-19 pandemic and the war in Ukraine has demonstrated the need for a well-functioning single market. As a result of these events, the EU is working to strengthen its strategic autonomy in order to ensure supply chains and reduce external dependencies. The pandemic and the war have certainly raised barriers to trade and free movement in the community, thereby strongly reducing the freedom of EU citizens to work and to settle, live and study in other member states.

## **Conclusion**

Achieving strategic autonomy (reducing external dependencies in strategic areas) and simultaneously preserving an open economy is a basic aim of the Union. The EC undertakes concrete measures to strengthen the resilience of the Single Market, to maintain investments and to support enterprises. In September 2022, the Commission adopted an instrument for supporting the Single Market in emergency situations. In proposing a completely new framework for crisis management, the instrument aims to preserve free movement of goods, services and people, to ensure the supply of products of critical importance in case of future emergencies affecting the single market and to prepare supply chains in case of future disruptions. It aims to complement the existing EU frameworks for crisis management, ensuring Europeans' equal access to goods in times of crisis, while preventing the closing of borders.

The Commission also presented a proposal for a directive on a high common level of cybersecurity in the EU (NIS 2), which addresses the same concerns with regard to cybersecurity. In September 2020, the Commission had presented a proposal for a Digital Operational Resilience Act (DORA) in the financial sphere, which would help strengthen information security in financial entities like banks, insurance companies and investment mediators. These two texts were adopted by the Council on 28 November 2022. The act created a regulatory framework for operational resilience of digital technologies, in which all entities must ensure they have protection, detection, containment, recovery and repair capabilities against ICT-related threats.

It is worth noting the words of Marghrete Vestager, Executive Vice President of the European Commission for A Europe Fit for the Digital Age. On 31 January

2023, she said, “During its 30 years of existence, the Single Market brought countless benefits to European business and also to European consumers and citizens. It provided prosperity and peace. Nevertheless, more should be done to ensure its proper functioning, to preserve equal conditions of competition and to tap its unused potential for the benefit of people and business. The new rules of digital services are the corner stone of a new digital economy, with safer online gateways, better protection for consumers and for private competition between traders”.

In fact, further action is necessary to achieve this, to ensure that the Single Market remains open, to reduce barriers for traders; especially in view of US protectionist subsidies for American industry. Only thus will the Single Market become more attractive both for investors and for citizens.

On 27 April 2023, the EC proposed reviewing the Community’s pharmaceutical legislation and to create a single market for medicines, thereby ensuring that all patients in the EU would have access to safe, effective and affordable medication. At present, medicines still do not reach patients quickly enough and are not equally accessible in all member states. The Commission points out that this will be the greatest reform in pharmaceutical legislation in the last 20 years<sup>39</sup>.

In its annual report for 2023, the EC confirms the crucial role of the Single Market for overcoming the challenges Europe is facing today. It emphasizes the importance of the Single Market for perfecting the economic model of the EU. On 31 January, 2023, Thierry Breton stated, “The success achieved in the last 30 years will be a basis for our future work with the member states to achieve correct application of EU law and not to permit new obstacles, specifically in the sphere of services, to be raised by national administrations. In the present geopolitical context and under conditions of intense global competition, a smoothly functioning single market will be a decisive factor for competitive capacity, employment and resilience of the EU”. With time, we will become increasingly convinced of the truth of his words.

For every European, Juncker’s words, that the EU is a union of values, seem to come as a revelation. “Europe is more than a single market. More than money, more than a currency, more than the euro. It was always about values. That is why, in my sixth scenario, there are three fundamentals, three unshakeable principles: freedom, equality and the rule of law.... Europe is first of all a union of freedom... Make no mistake, Europe extends from Vigo to Varna. From Spain to Bulgaria. East to West: Europe must breathe with both lungs. Otherwise our continent will struggle for air”<sup>40</sup>.

These thoughts are still topical today. The EU is continuing to expand. The hopes of Ukraine and of the West Balkan countries lie in EU enlargement and the strengthening of the single market. The EU’s ambition in this respect requires dealing

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<sup>39</sup> The European Commission proposes the creation of a single market for medicines for all patients in the Union <http://insmarket.bg/%>

<sup>40</sup> <https://www.europedirect.szeda.eu/docs/szeurobuletin-br35.pdf>: 5ff.

with criticisms that the Union is not efficient enough. The existing rules should be applied more adequately.

In view of the chronology presented here, we may justly conclude that the Single Market is developing to meet the growing demands addressed by every European citizen to its institutions and community policies. It is important to overcome bureaucratic insensitivity. Only thus can the principle be upheld, that the EU is based on values, and only thus can the Single Market develop and assert its importance for the future of Europe.

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**About the author:** Ani Dimitrova holds a PhD and a master's degree in economics. She has had more than 15 years of professional experience in positions of leadership in the banking sector, public administration and the private sector. She is a part-time lecturer in the University of National and World Economy.

**PART II:**

**Digital Europe**







# Gender Inequalities in the Digital Domain. Bulgaria in a Comparative Perspective

Rumiana Stoilova

**Abstract:** *This study is in line with the vision formulated in the EU regarding the need to implement targeted gender-equality policies, as reflected in the Gender Equality Strategy 2020–2025. The Strategy focuses on various aspects of gender equality which have the capacity to decrease the gender pay gap and to increase women's participation in training in science, technologies, engineering and mathematics (STEM). The research focus is on Bulgaria, where the share of women in the field of STEM and working in the ICT sector is at the highest level among EU countries, but where there is an alarming downward trend of girls studying STEM disciplines, a problem that requires deeper investigation. The research interest is on occupational groups in the ICT sector, and specifically on an analysis of their willingness to undergo additional training. This paper applies in a comparative perspective a gender-sensitive approach based on quantitative data. In addition, two case studies are analyzed, which illustrate the obstacles to and chances for women's entrepreneurship, as well as the strategy of changing an initial occupation for a better career in the ICT sector<sup>1</sup>.*

**Keywords:** gender, entrepreneurship in ICT, adult education.

## Introduction

According to the Gender Equality Index (2020)<sup>2</sup>, the average gender-based differences in the EU with regard to skills and use of skills are insignificant: with regard to skills in solving concrete problems and performing tasks, the difference is seven percentage points; for skills above basic and skills in software use, the difference is five additional percentage points for men. With regard to inclusion in training, women have four percentage points less than men. Considerable inequalities between men and women appear in segregation and separation first in education and then, as a consequence, on the labor market. Overall, across the EU, men and young people dominate in the development of new technologies. Women represent 20% of

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<sup>1</sup> This paper is written within the project “Digital Divide and Social Inequalities: Levels, Actors and Interplay”, financed by the National Science Fund, Ministry of Education and Science, КП-06 ПН55/7 от 2021-2024.

<sup>2</sup> The Gender Equality Index 2020 focuses on digitalisation and is elaborated in European Institute for Gender Equality (EIGE), <https://eige.europa.eu/news/gender-equality-index-2020-can-we-wait-60-more-years>

<https://eige.europa.eu/gender-equality-index/thematic-focus/digitalisation/country>

graduates in ICT, have the lower share (17.7%) among ICT specialists, and represent 20% of the scientists and engineers in the high tech sector. The ICT sector offers better chances for achieving equal pay between men and women, stands at 11% in that sector, while the EU average for all sectors is 16%. There is a gender gap in the ICT sector as regards part-time employment, which is 16.5% for women and 5.4% for men (EIGE 2020 Gender Equality Index). There are economic and social reasons in the justice perspective for the inclusion of people of different ages and genders in the ICT sector. It would enlarge the pool of human capital involved in innovations and in work with higher added value.

On the Digital Economy and Society Index (DESI)<sup>3</sup> and the indicator for human capital, Bulgaria occupies the highest position only with regard to the share of employed women working in the ICT sector. This makes Bulgaria an outstanding and interesting case. The tendency, however, is for the largest decrease of women in the ICT sector precisely in Bulgaria, while in most European countries the trend is contrary: for a rise in the share of women in that sector<sup>4</sup> and studying STEM.

From 2017 to 2020, Bulgaria registered a decrease of the share of women graduates in ICT by 38 percentage points, down to 25%. Countries like Denmark, Sweden and Greece show, by contrast, a growth of the respective share by the same percentage. Austria presents a rise from approximately 0% of women in that sector to 15% during the same three-year period. What are the mechanisms that lead to a reduction in the number of women and the motivation for young women to study in specialties that orient them to work in the ICT sector? Do women take advantage of the possibility to change their educational profile and find jobs as programmers? What are the social mechanisms that motivate women's entrepreneurship and what are the obstacles that lead to the low participation of women as entrepreneurs and among the startups in the ICT sector?

The reasons for seeking a greater variety of workers in the ICT sector are related both to justice and to economic advantages. Enlarging the circle of people undergoing training and being hired is a goal based on economic considerations. Justice requires abolishing social barriers in terms of stereotypes influencing the choice of education and a profession suitable for men and women, but also requires eliminating discrimination in the choice of staff hired for work in the fastest-growing sector in Bulgaria.

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<sup>3</sup> The Digital Economy and Society Index, 2021

<sup>4</sup> The Norwegian embassy's report "The ICT workforce in Europe and the Gender Challenges after Covid-19", prepared by WomenGoTech, the first NGO mentorship and consulting program for women in Lithuania <https://womengotech.com/app/uploads/2021/09/ICT-workforce-in-Europe-and-its-gender-challenge.pdf>

## The case of Bulgaria

The Bulgarian Association of Software Companies Annual Report for 2022 on the development of the software sector in Bulgaria<sup>5</sup> shows the most rapid of all growths was in this sector. There is practically no industry in which new software systems are not being implemented. An increasing number of professions require creativity and digital skills. Eighty percent of the sector in Bulgaria works for export. Despite the COVID-19 crisis, the growth of income in 2021 was by 20.2%. The sector's share of revenue in the GDP of Bulgaria grew from 2.1% in 2015 to 4.5% in 2021. In 2020, more than 40,000 people were occupied in the software sector. The new jobs have been growing by 12% a year on the average. The mean monthly remuneration is three times higher than the average for the country. In 2021, it was 3.2 times higher. It is expected that the remuneration of software engineers, corrected for living standard, will continue to exceed the average levels of pay in Germany and Great Britain.

The number of people occupied in the sector has grown ten times in 20 years. However, data on the composition and the working conditions in the sector are limited. In 2012, a document entitled “Strategic requirements of the software industry for a reform of the education system”, elaborated for Bulgaria, declared the ambition to work with all stakeholders<sup>6</sup>. Among the envisaged measures is “facilitating and accelerating the procedures for ‘import’ of software specialists from abroad”; “engaging Bulgarian specialists returning from abroad”; “sharply increasing the quality of training of mathematics in school for *all* children” (2012:26). The emphasis on “all” is in the document itself, and a separate, important problem of education has been referred to only with this single word: the problem of equal access to education that gives better possibilities for work in a fast-developing sector of the economy. The “Strategic requirements of the software industry for a reform of the education system” indicate as an example of good practices the program “Together in Class”, which sets itself the goal that “every” child in Bulgaria should have access to quality education and to Jump Math, the innovative system for teaching mathematics, which, it is noted, has achieved “exceptional results for all children (2012:24). The requirements from 2012 are still valid and the focus in 2022 in the establishment of STEM laboratories in the schools does not sufficiently succeed to raise the motivation of students and the competence level of teachers in the process of ongoing digitalization.

## Gender mechanisms

Yuval Harari finds the history of gender puzzling. Although the patriarchal system is based on myths and not on biological facts, and despite the historical changes it has undergone towards greater equality, this system remains universal and stable (Harari

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<sup>5</sup> BASSCOM Barometer 2022 [https://basscom.org/RapidASPEditor/MyUploadDocs/BASSCOM\\_Barometer\\_2021\\_BG.pdf](https://basscom.org/RapidASPEditor/MyUploadDocs/BASSCOM_Barometer_2021_BG.pdf)

<sup>6</sup> Strategic requirementsofthesoftwareindustryforareformoftheeducationsystem.Version 1.0, 2012.BACKOM.

2011). Achieving a permanent change towards gender equality is a long process that requires changing the socially constructed roles and stereotypes, and overcoming the gender mechanisms that restrict women's access to work in the IT sector. The gender mechanisms are based on stereotypes and division of gender roles in ways not actually presupposed by the biological differences between men and women. Ahuja's (Ahuja 2002) model of the barriers womenface in the IT professions differentiates between 1/ social factors (social expectations/cultural values; work-family conflict) and 2/ structural factors (occupational culture, lack of role models, access to informal networks, lack of mentors, institutional structures).

Some important gender-specific mechanisms are those related to time (Stoilova 2009, 2012). This includes 1) the need for additional qualification (leaving this task for a woman's spare time may lead to women's underrepresentation); and 2) the need for time synchronization in globally operating firms. The newly adopted changes in the Bulgarian Labor Code, following an EU Directive in the field, which are in effect since August 1, 2022, are related to a number of new rights of workers and employees in connection with the labor contract. The changes concern the time of compulsory training during working hours; and a new type of leave from work for fathers of children aged up to 8 years. The time-related restricting factors of women's work remain, and every woman faces the challenge of negotiating with her employer the possibilities for flexible working hours, the autonomy to determine the start and end of the working day, the synchronization of time among geographically dispersed teams, the participation in meetings after the end of working hours, and childcare paid by the state.

The significance of digital inequalities intercrosses and overlaps with a wide range of characteristics, both at the level of the individual (gender, ethnicity and age) and at macro-level (economic status and social capital). Differences between men and woman in access to the Internet have practically disappeared, but they remain with regard to the derived benefits, which differ depending on a person's social capital, educational attainment and possibilities for work. Contributing factors of these gender differences are social mechanisms related to: 1) gender-specific skills and content produced and disseminated through the Internet; 2) gender-specific work processes and jobs that require the use of digital technologies (Robinson et al. 2015). These mechanisms can be divided into three types: gender stereotypes, women's self-assessment, and professional realization.

Internet use corresponds to the social roles, the expectations of others, and the interests women have in their offline life. For instance, women are more inclined than men to use the Internet for social contacts and social support. The stereotypical feminine behavior and attitudes in society are reproduced in online use as well. Presentation in the Internet often reproduces gender stereotypes: men are depicted as strong and aggressive and women as physically attractive and passive. Studies on the difference in self-presentation between men and women in the Internet also emphasize another factor, concluding that women are more likely to underestimate their Internet skills than men, who are inclined to overestimate them (Robinson et al.

2015). Professionally, women are much less represented than men as programmers in the IT sphere.

Discrimination is another important mechanism for the lower participation of women in the IT sector. A comparative study of employers and their preference to choose men than women for work in the IT sector has indicated the existence of discrimination against women in Bulgaria, Switzerland and Greece, but not in Norway (Bertogg et al.2020). In Bulgaria and Greece women have a larger share in IT occupations than in manual, male-dominated occupations, such as the profession of mechanics. Recruiters may assume that the more flexible IT jobs are more accessible for skilled women, leaving wider room for temporal and spatial flexibilization in IT companies. There is no discrimination in Norway for both occupations – mechanics and IT developers, because of well-designed equal opportunity policies applied in that country. In Norway, there is a widely applied legislation, and a high degree of normative acceptance, of gender equality, such as is lacking in the other three countries. The normative acceptance is essential for the effective implementation of the laws related to gender equality. Policies are able to change socially constructed gender roles in a grater extend when the normative consensus is established in the society.

There are relatively few women-owners of companies in the IT sector. And not many of these women succeed in becoming visible and serving as role models for other women. That is why the strategies used by women entrepreneurs can indicate for other women the ways to overcome the gender barriers that prevent women from even dreaming about having a business of their own in the fast-developing IT sector. Specialized training in ICT designed to the needs and obstacles before the small business enterprises , targeted at businesses managed by women gives ideas not only how women differ from men as owners and managers of such enterprises, but also how they can overcome existing barriers in the society or in their closest environment. The need for targeted training for women is due to the fact that they work primarily in small businesses that can hardly afford to devote resources, such as money and time, for training their staff in digital technologies. Women owners are disproportionately few, and there are reasons for this, defined as gender-specific obstacles faced by women with regard to the use of digital technologies. Researchers on the topic have identified gender-specific obstacles related to the size of the company but also to how women respond to the obstacles that prevent them from introducing digital technologies and that must be dealt with before attempting to build a successful independent business. These obstacles may be grouped under several larger topics (Orser et al. 2019):

1. Preliminary conditions that female owners of firms lack: a suitable education; the necessary knowledge; habits of working with technologies; correct convictions – for instance, awareness that one need not have mastered coding in order to work with and introduce technologies; sufficient time, given the double burden of work and family obligations.

2. Access to services and ways of coping with the introduction of technologies: financial resources, compatibility with women's usual way of working, access to courses and training, sufficient connections and sufficient participation in social networks that

discuss technological solutions and problems (women may feel embarrassed to ask for help for technical problems in groups in which most co-workers are men).

3. Low expectations of achieving results: low expectations that technologies would improve the business results; women do not see technologies as a priority that would make them more successful.

4. Social obstacles: lack of role models; lack of focus in communication between women on the importance of technologies; the existence of traditional role models, where by women rely on others to make decisions.

5. Age as an obstacle to undertaking or learning something new. Digital inequalities are largely a generational problem, and gender-specific problems come in only second in as much as young women are able to surmount the technological barriers more easily than women of older generations.

6. Trust in one's own strength and potential.

7. Abilities, skills and qualification.

8. Willingness to take risks.

9. Lower expectations for success in a business of one's own. Feeling satisfied with what one has achieved and insufficient striving to develop, including through the implementation of new technologies.

10. Characteristics of the firm and the sector in which the firm is operating.

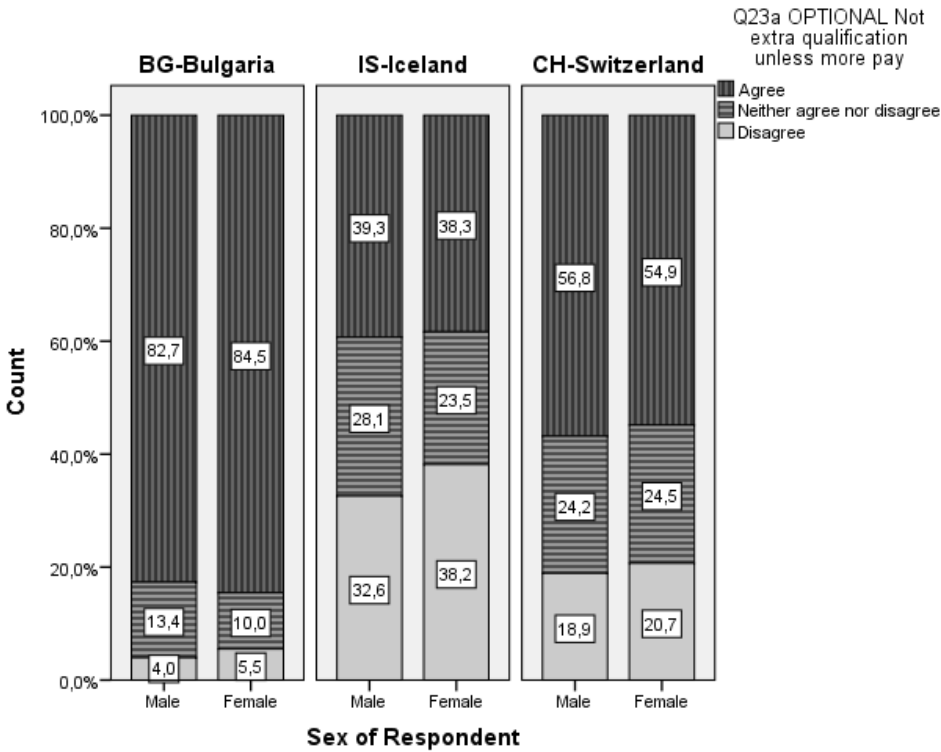
This article analyses the impact of these barriers for a women-owner of a small ICT firm and the strategy of additional training for the access to ICT sector in Bulgaria, as two cases, which give examples for successful overcoming barriers before women in the ICT domain. We use a mixed-method approach. The cases of women with regard to obtaining additional qualification and for entrepreneurship in the ICT sector are analyzed on the basis of in-depth interviews.

Beside the qualitative analysis, there is provided a comparative analysis based on quantitative data, with the aim to examine gender differences in the readiness for additional training among employees in the ICT sector in European countries. The quantitative data are drawn from the latest wave (2021) of the International Social Survey Program (ISSP), dedicated to social inequalities.

### **Attitudes to additional training**

Using comparative individual data drawn from ISSP 2021, we focus on additional training and qualifications as an important component of the work situation in the ICT sector, and for all societies in the course of the accelerated digital transformation. The international comparison is between responses to the question about additional qualification includes Bulgaria, Iceland, and Switzerland. The statement "Workers would not bother to get skills and qualifications unless they were paid extra for having them" is supported by over 80% of Bulgarian respondents and by just under 40% of Icelandic ones; between the two countries is Switzerland, with just over 50% of the respondents who agree with this statement. The differences in the answers by gender are insignificant (Graph 1).

**Graph 1 Responses to the statement, “I would not get additional training if it does not lead to better pay”**  
(within the whole population)

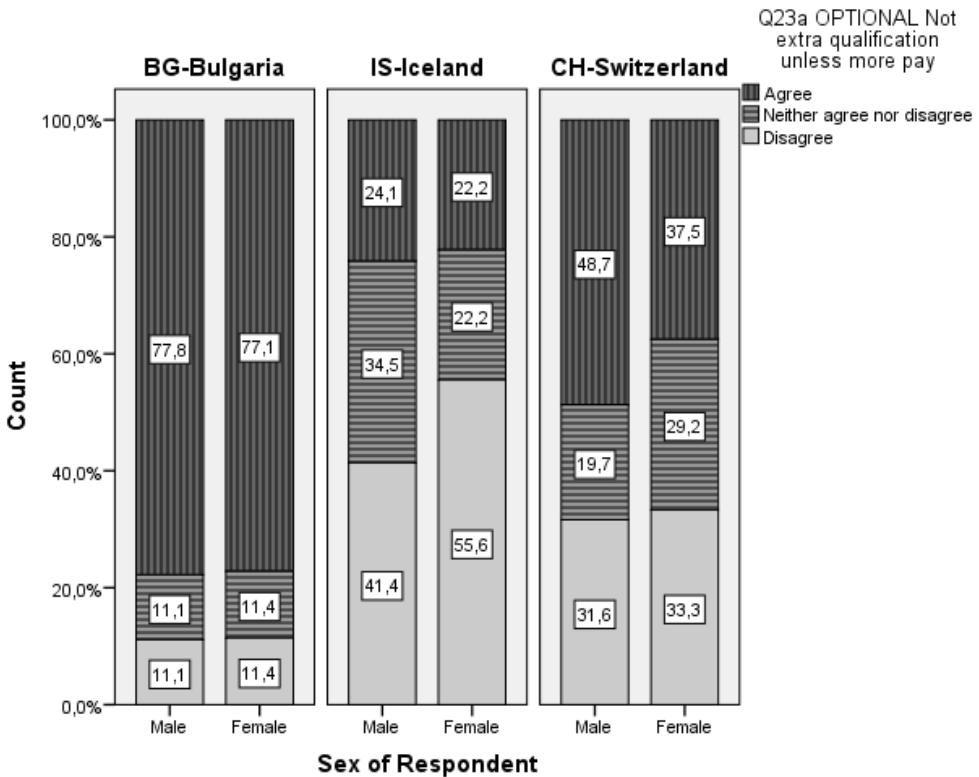


Source: ISSP 2021 , statistical analysis Kaloyan Haralampiev.

When we analyze the data only for respondents in the ICT sector, we find that the percentages of those who agree with additional qualification only when it comes with additional remuneration decrease even further in Iceland to 20%, while in Bulgaria and Switzerland the decrease is not so large compared with the answers of the whole sample (Graph 2). In Switzerland, however, the gap between men and women in the IT sector is the largest - 48% of men and only 37% of women in the IT sector would consent to undergo additional qualification only if this leads to higher incomes. The greatest support for additional qualification only when it comes with extra pay is by people in the age group 25-30 years, followed by people over 50, with the youngest and those in the middle of their career being less likely to agree with this statement - about 52% of respondents.



**Graph 2 Responses to the statement, “I would not get extra training if it does not lead to better pay”**  
(among those occupied in the IT sector)



Source: ISSP 2021, statistical analys Kaloyan Haralampiev.

The data on the influence of COVID-19 on the labor situation of the people in the Bulgarian sample and in the IT sector do not differ significantly. Over 90% of the respondents state that the labor situation for them has not changed significantly in terms of their employment status. However, the reduction in income is a fact for those working in the IT sector. Women indicate getting 28% lower income during the COVID-19 pandemic, compared with 22% of men.

### **Additional training as a strategy for entering the IT sector**

#### *The case of Olga*

Olga is the leader of a quality assurance team. This is one of the two leadership positions in a company that consists of 12 employees and is a daughter company of a large foreign company. She is 35-years old and jokes about being the oldest person

in the company. The employees are mostly young, 21-years old. According to her, the oldest people in the IT sector are about 45-46 years; that is the maximum age. She sees the reason for the absence of older people in the fact that quality assurance is a new profession and there is little chance that people will have practiced it for a long time, as ten years ago, it was not a separate profession. But she goes on to say that such an explanation does not apply for the profession of developers, and yet none among them is older than 50 years.

*Requalification*, in her view, is a working strategy for entering the IT sector. Olga has a master's degree in Cellular Biology and Pathology. She took advantage of her motherhood leave to enter a two-years course for developers in a private software academy, the reason for this being that she saw no perspective in Bulgaria for her initially chosen profession.

*"If I had remained working as a biologist, I would have had no development. I was writing a doctoral dissertation, I had to go back and defend it. After the doctoral studies, your only choice is a post-doctoral somewhere and... somewhere is usually not in Bulgaria, because here the possibilities are considerably less and the pay for post-doc programs is considerably less."*

In this case maternity didn't have a negative impact on Olga's career. During her maternity leave, Olga started attending a course for programmers, where she studied the programming language JAVA, and after the end of the leave she completed a two-year training course. She was then offered a job in quality assurance (QA). In the five years after finishing the course, she has worked for the company, she consecutively passed through the positions of junior, middle level, and senior specialist, and reached the position of unit leader for quality assurance of programming products. In three years, she became a senior, which was comparatively fast in her opinion. She is convinced that the work offers her "good chances and possibilities".

From additional interviews in the bank sector we know that maternity leave slows down the career growth of women. After returning to work, their salaries are not updated, which is a very negative factor in the post-COVID situation and the high inflation that ensued after the start of the war in Ukraine. Technological changes raise high challenges for women after interruption of work during maternity leave, and there is a risk the employers' support will not reach mothers with small children. In this situation Olga's suggestion is:

*"Women should compensate in the course of work. Nobody will send you to get training when you return from maternity leave, because the bosses want to see whether you will get quickly back in pace and how often the child will be sick ..."* According to Olga, *"to train and develop is an inevitable process. You must train constantly. This is at least half your work process."* She has personally taken part in extra trainings funded by the company and has received additional overtime bonuses.

Home office is the new reality after the COVID pandemic, and inasmuch as people employed in the IT sphere are mostly young women, the teams understand the need for more work from home and of combining work for the company with care

for the child and the family. *“Before the pandemic, home office was an exception. The normal thing was to go to the office. Now going to the office is the exception.”*

Despite the cooperation that colleagues offer and the support of the managers, women in the IT sphere encounter difficulties connected with prejudices regarding their aptitudes as programmers:

*“They usually don’t perceive you as a person with enough authority; they think you are not capable in technology because women, according to men, are stupider. There is discrimination in this aspect. There is also discrimination in the process of hiring people, especially women with little children... When I conducted hiring interviews and consulted my team about whom they liked more, whom I should hire, I also heard comments: ‘Hire the man, he won’t take maternity leave.’ But I think we should hire the more qualified one, no matter that he will take maternity leave. So women are still considered not that qualified.”* Women are assigned the easier tasks for longer periods of time due to lack of trust they will cope. *“There is a rather long process in which you have to prove yourself, and it is longer when you’re a woman.”*

On the other hand, women managers have certain advantages, which they use to change the leadership style in the organization. Olga strives to establish closer relations with her colleagues, better communication between leaders and newly-hired staff, young employees; she feels such relations are important for how the work is run.

*“We keep relations in the company more open, we strive to share more information with one another, because that was something that I have always felt the lack of – both in the IT sphere and in biology. Communication between the lead levels and the junior levels is usually a bit lame. The junior person doesn’t know where he is working, why he is working, how long he’ll be there. In many cases, I don’t know either, but we try to maintain the communication open.”*

The conclusion from the interview with Olga is that women encounter specific difficulties while caring for little children. But they can overcome them with additional training and support by the managers. Women also enjoy advantages if they are able to study and continue to develop professionally during the maternity period.

## **Women’s entrepreneurship – barriers and advantages**

### *The case of Dany*

Dany, 36-years old, is a female owner of an IT company. She has the necessary education: she graduated a mathematics high school and after that graduated in informatics (with a major in programming) at a university in her native city. At the university, she chose programming as a specialty, not “teacher”, because her mother and father are programmers. *“That is my heritage, I am continuing the line. My grandfather also applied for studying engineering in Germany”*. Dany has experience both in programming and in work at the company founded by her father. After he withdrew from the business, Dany took over the company. She does not complain of lack of time, because the firm operates entirely for the local market.

*“In other companies, foreign ones, which work in time zones different from our time zone and the working hours are unusual, you might have to work at any time; this is not appropriate for a women.”* The time zones for globally dispersed teams make such work inappropriate for women with small children, so, in Dany’s opinion, the local companies have an advantage with regard to hiring women.

She does not feel any shortage of financial resources although her funds are not large. Here we may note what is said about companies owned by women, namely, that their striving to enlarge their size is mostly limited to the range of what they have already achieved. Her company has 36 employees, of whom five are programmers; they are able to cope with the orders in pre-hospital assistance without having to draw bank loans.

An important factor of the company’s successful functioning is the participation of the manager-owner in the professional association of software company owners working in the same sector as Dany. This professional organization was recently founded to protect the interests of small software companies (in the area of pre-hospital assistance) before the state institutions they work with. There are few women in the association, but they definitely do not feel there is any bad attitude towards them. The only important consideration in this respect is the company as such and how it has presented itself over the years. That is why the women-owners of software companies are not underestimated; *“I haven’t sensed anything like a difference”*.

As for social obstacles in terms of traditional role models and low public expectations from women in the sphere of programming and technologies, Dany felt such 20 years ago, in the university, when she heard one of her teachers say the following: *“Girls, we don’t expect you to do great things, because this is a man’s sphere.”* And she concludes:

*“If a girl doesn’t come from a family that backs her up, such an attitude on the part of the teachers automatically de-motivates you. Women who showed greater interest and were not isolated, but were not encouraged to try and see whether they might like programming, are at risk of losing interest. Because until you try doing something, there is no way you can know whether you are good at it. You don’t always see whether the concrete job suits you and whether you can grow in it. And when there is motivation as well, and support, more women will want to give it a try in the sphere of programming. I know from my father that women should be tolerated, because women work very well, but they should also be told that they work well. They should be given a chance. Then they become very good at their work.”*

The specific task of the company’s sector is to create software products and solutions in pre-hospital assistance; its products are most widely used by general practice doctors. The company holds one fifth of the market. It provides programming products for specialists, for laboratories, for dental surgeons and for occupational medicine. Each of these clients requires a separate product, which is designed for the particular case and requires maintenance; the company deals in sales and servicing. The latter activity proves to be a decisive gender-related reason for the company to hire, and work entirely with, women. A remote access maintenance unit

has been created. Four young women work in the city, and they are looking for a fifth. Interviews are conducted for this, and the application of a woman programmer would have an advantage. The reason for this, according to the company owner is that : *“software maintenance is not the typical hardware or technician maintenance but involves explaining how the product works. We offer assistance to the doctor by explaining to him/her how to work with the program, we respond to questions that the doctor or the medical nurse has, what they should do with the product, and this is generally not the kind of work that a man would prefer”*.

But Dany clarifies an additional reason why women are chosen: *“With us, the salaries are not competitive compared with the salaries in Western companies. The price of the programing products in pre-hospital assistance is low, and the work is very dynamic. This is imposed by the state institutions in this branch and the accelerated introduction of electronic healthcare services. So there is a lot of work in comparison with the received remuneration.”*

Thus, the coin proves to have two sides: woman-programmers work in the company, the owner shows understanding about the working hours, they work only for the local market and they don't have to work after the end of the working hours of the childcare establishments. But ...the pay is lower than the average salaries of programmers, especially in companies that work for foreign markets. So the conclusion is that the coin has two sides – more women in the firm give better opportunities for WLB but the wages are lower compared with the programmers working for other firms as developers. The company hires some developers in retirement age: the oldest is aged 74. She also copes well with her work, although she is a little slower than the others, and would prefer to work from home. This is not a problem for the owner, who knows this employee well, trusts her, and can control her daily work from the office, through the company's network. Thus, the companies owned by women contribute to ensuring higher level of diversity and the inclusion of older employees.

We drew the same conclusion, regarding the greater potential for hiring older employees and regarding work in a diverse team, from the group discussion with people working in the public sphere who are part of a team headed by a woman. The chief accountant of the company, who is a woman retiree from the banking sector, has acquired experience in the last ten years of continuous entry of digital technologies in the finance sector. She is not afraid or unwilling to learn about new products and programs implemented for greater safety in the financial sphere, and continues to work successfully after reaching retirement age. When she has difficulties, she is not embarrassed to consult her younger colleagues. Diversity is a value that is well applied in teams headed by women. This enables the participation of a wider circle of potential employees, including people in retirement age, who have the desire to continue working and learning. Exchange of knowledge between generations is also ensured in this team, as well as financial resources for new technological programs, training and support. Shortage of financial resources for the technological change is a serious obstacle for the process of digitalization in the public sphere as a whole in Bulgaria, where women and employees over 50 prevail.

## Conclusion

In this paper, we sought the answers to several research questions. What are the mechanisms that lead to underrepresentation of women in the ICT sector at macro and micro level? The analysis of the quantitative data and the interviews confirmed the conclusion that differences between men and women are preserved with regard to the benefits of digitalization, which remain unequal as regards the chances of obtaining work as developer in a private firm. The results confirm that the existing gender differences are due to social mechanisms connected with gender-specific work and jobs that require the use of digital technologies (Robinson et al. 2015). The explanation that women primarily chose to work in the sphere of services for clients corresponds to one of the causes indicated in literature (Orser et al. 2020). The same is true as regards the lower expectations for good results and the avoidance of financial risks involved in drawing loans and expanding the activity. The present analysis shows that the company headed by a woman, in which women programmers are preferred as employees, offers lower pay, which women are willing to accept, while men would more probably look for better-paid work as programmers. This option is possible for men due to the peculiar market conjuncture for this profession. Combining work and family is a mechanism that also restricts the possibilities for women with children to get better pay as developers. The greater decrease of women's income than men's in the IT sector in Bulgaria during COVID is probably also a result of unequal gender distribution of commitments to childcare and the family, of work under the COVID pandemic restrictions and the growing importance of work from home.

Discrimination, the taste-for-discrimination model (Becker 1957) is a significant negative mechanism for selection of women in ICT. The existence of discrimination against women in Bulgaria registered in previous analyses (Bertogg et al 2020) was confirmed through the interviews. Discrimination is evident in the preference for hiring young women without children for work in IT companies. The lower expectations teachers from young women in STEM specialties de-motivate some of them to seek higher achievements.

However, one of the social mechanisms with a restrictive effect on women, according to Ahuja's (Ahuja 2002) model, i.e., the insufficiency of informal networks and connections, is indicated in a positive aspect by the owner of the IT company in Bulgaria, who talked about the newly created association of companies in the sector of pre-hospital medical care, and the respect expressed for all members of the association regardless of gender.

Women in managerial positions change the style of management, improve communication between employees and make the structure more horizontal; thus, collaboration lends force to each employee of the organization. This conclusion is in line with the basic feminist thesis regarding the need for respecting differences between men and women and using those differences so that both genders can contribute what us unique to each: "It would be a thousand pities if women wrote like men, or lived like men, or looked like men, for if two sexes are quite inadequate, considering the

vastness and variety of the world, how should we manage with one only? Ought not education to bring out and fortify the differences rather than the similarities?” (Virginia Woolf, quoted in Steinmetz 2012)

With regard to the question, “Is it possible to change one’s initial formal education and upgrade it to ICT occupations?”, Olga gives a very informative answer: it was possible for her to change her specialty and to develop programming skills to a sufficiently high level even during her maternity leave. In her case, however, we should note that this positive example is of a woman with high human capital: she received a university education in the natural sciences and was strongly motivated to continue learning. Hence, all initiatives to motivate girls to choose STEM disciplines early in their educational career are beneficial for their future in the fast technological transformation of the societies.

The interviews also give an interesting answer to the question “What are the benefits of women’s entrepreneurship in the ICT domain?” Women face obstacles in that sector, which contribute to their limited presence there, but their inclusion in ICT has its advantages. They change the style of leadership in the organization, stimulate communication between different management levels and work for diversity of the teams. Women on manager positions rely on sharing and cooperation between employees from different generations. That is why the participation of women in the sector should be stimulated; the recommendations should be addressed in several directions: to the government, to universities and high schools, and to companies and employer’s organizations.

### **Policies for more women in the ICT sector**

This study is in line with the EU’s vision regarding the need to implement targeted gender-equality policies, as reflected in the Gender Equality Strategy 2020–2025. The Strategy focuses on various goals of gender equality which have the capacity to decrease the gender pay gap. Of these, this paper contributes to the goal of increasing the training participation of women in science, technologies, engineering and mathematics (STEM). The research focus on Bulgaria, where the share of women in the field of STEM is the highest level among all EU countries, points to the positive strategies but also to the alarming tendency of decrease in the number of girls in STEM disciplines, a problem that requires deeper further study. The decisions taken at EU level are important for the trends related to gender equality in the member states, in spite of the resistance against, and abuse of the concept of gender in Bulgaria.

National governments should take measures to increase the number of women working in the digital professions. There are different measures and national governments should decide to create funds to develop the next generation of talent and help women enter the field of IT technologies, to support their return to work and for additional qualification, to stimulate female entrepreneurship.

At the levels of universities, schools and teachers the focus should be on the training of teachers, they should talk to students about the professions of the future, including a strong focus on STEM topics in schools. People need to know that in the future many of the things we do will be dependent on digital technology.

Regarding organizations, the recommendation is to provide role models, to support young mothers by ensuring more flexible conditions to make them feel comfortable. Support should be provided to older employees. *“As we move through different career stages, flexibility at work is particularly beneficial”* (Danny Michaud, who is leader of KPMG’s EMEA cyber security practice)<sup>7</sup>.

In order to increase the number of women working in cyberspace, professional profiles should be advertised for work in the field of security, going beyond the purely technical aspects and emphasizing the social aspects of security. *“I have always been interested in team dynamics and how people behave, so I chose cybersecurity in order to help clients build better security teams and some basic security processes. Women can successfully accomplish exciting tasks, even if they don’t like hardcore technologies.”* (Olga Kulikova, senior manager of Digital Transformation and Cyber security at KPMG – the Netherlands)<sup>8</sup>.

The present article has its limitations and implies further research on the question, *“To what extent does the teaching of mathematics and natural sciences contribute to the social mobility of children from families with a lower socio-economic status?”* The systematic and constant study of this question would contribute to avoiding the loss of talents, the recognition of talents and their development from an early age. This concerns girls and boys equally, who should be guided and motivated to study STEM disciplines from an early age.

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**About the author:** Rumiana Stoilova is Professor at the Institute of Philosophy and Sociology, at the Bulgarian Academy of Sciences and is President of the Bulgarian Sociological Association (since 2018). She is team leader of the projects “Digital Divide and Social Inequalities: Levels, Actors, Interplay” (2021-2024), funded by the Bulgarian National Scientific Fund. She is the leader of the Bulgarian team of the project “Negotiating early job-insecurity and labour market exclusion in Europe”, Horizon 2020 (2015-2018) and is principal investigator on the Bulgarian side of the project “Social disparities and regional differences in school-to-work transitions in Bulgaria” (2012-2015) in partnership with the University of Basel.

# Bridging the Digital Divide: A Comparative Analysis of Media Literacy in Europe and Bulgaria during the Pandemic

Stefan Markov

**Abstract:** *Digital divide is a contemporary phenomenon that reflects the uneven access to ICT technologies and the varying knowledge and motivation of individuals worldwide concerning their use and benefits. Particularly relevant is the issue of the so-called „third level“ of the digital divide, which highlights the fact that certain users of ICT technologies gain disproportionately large „offline“ benefits - economic, cultural, political, career-related - from their online presence. The outbreak of the COVID-19 pandemic in the last three years has shed new light on this issue. With frequent lockdowns imposed worldwide, most people were compelled to focus on online activities, thereby making crucial the ability to derive real, measurable benefits and positives from modern technologies and the Internet.*

*This text examines the relationship between media literacy and the digital divide under pandemic conditions. Based on various statistics and research findings, it is concluded that the level of media literacy is directly correlated with the ability of contemporary digital citizens to gain or lose important advantages from the use of ICT technologies and the online environment. Comparisons are also made regarding media (and digital) literacy and the ability to identify online disinformation among users in Bulgaria and some other European countries. Based on this analysis, it is concluded that weak public media literacy has more dangerous and harmful effects than ever before, and it reinforces the digital divide and its consequences. The trend is alarmingly strong in Bulgaria and less so in developed European democracies. This study emphasizes the need for urgent and effective measures to combat the digital divide and enhance media literacy, particularly in the context of ongoing and (potential) future global pandemics<sup>1</sup>.*

**Keywords:** Third-level digital divide, media literacy, digital literacy, COVID-19 effects, disinformation.

## Introduction. The COVID effect

Towards the end of 2019, a virus that had not previously affected humans made the jump across the species barrier and began to infect people, first in China and then, spreading rapidly, worldwide. This marked the beginning of the global coronavirus problem. By the end of January 2020, the World Health Organization (WHO) had declared a “Public Health Emergency of International Concern” in response to the

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disease, which was reclassified as a “pandemic” on March 11, 2020. As of January 1, 2023, the number of confirmed cases of coronavirus infection had reached almost 652 million, with over 6.6 million confirmed deaths. However, when accounting for excess mortality, the World Health Organization estimates that between 16 and 28 million people may have lost their lives due to the disease (WHO, 2023).

It is difficult to overstate the impact that this pandemic has had on the global population. Although the pandemic is now almost under control, it would be exaggerated to suggest that everything has returned to normal. As of the final week of December 2022, over 3.5 million new cases of coronavirus infection were reported worldwide, and over 10,000 people had lost their lives to the virus during that period (Ibid.). These figures highlight the continued spread of the disease and the profound impact that the virus has had on the lives of people all around the world.

The pandemic has unleashed various effects and consequences that could not have been predicted, and it has only been with the passage of time that we have been able to assess the impact of the anti-epidemic measures that national governments have implemented throughout the past three years. Perhaps the most significant consequence (beyond the immediate health problems and risk of death) has been the widespread and comprehensive lockdowns imposed by almost every country on the planet. For the first time in recent human history, people were globally deprived of the ability to move and work as they had done before. For extended periods of time, many people across the globe were forced to work from home, refrain from going outside, and avoid traditional forms of socializing, while education transitioned almost entirely to online formats. Social scientists are yet to study the effects on the mental health and development of children and adults who have been living under lockdown for long periods of time, and medical professionals will grapple with the need to analyze the side effects of the virus, such as “Long COVID,” as well as other health consequences. However, it is undeniable that the past two years have left a profound and lasting imprint on every aspect of our lives - spiritual, physical, intellectual, social, and professional. None of us are the same as before, and life has been transformed in innumerable ways, with our online presence becoming a natural extension and alter ego of our real-life existence.

### **Digital Divide: the three levels**

Lockdowns and remote work/education have shed light on the enduring issue of the digital divide (also known as digital inequality), which has evolved over time. Today’s situation bears little resemblance to the one to which the same term was applied 30 years ago. Initially, the term “digital divide” referred to a purely technological phenomenon – the gap between those with access to computer technology, ICT, and the Internet, and those without. The proliferation of personal computers and the World Wide Web was relatively slow, largely concentrated in the most economically developed countries. Consequently, a new social divide of a technological nature emerged in the 1990s. A minority had access to ICT and the

Internet, while the majority did not. By 2002, only 10% of the world's population had internet access, with 88% of these early adopters residing in developed industrial countries (Chen, Wellman, 2005). Even among these, an "internal digital divide" existed, as the majority of people with access were financially secure, educated, white, young, and urban dwellers.

Over time, the technological aspect of the digital divide (the haves versus the have-nots in terms of ICT and internet access) was deemed insufficient to explain emerging social differences. Researchers began to investigate what they called the "second level of the digital divide." This term encompassed the uses of ICT and the Internet, rather than users' access to equipment. Studies were initiated to understand the extent to which people differ in their use of technology and how prepared, knowledgeable, and skilled they are in utilizing hardware and software potential. The focus shifted from technical resources to knowledge resources, motivation, and practices. It became evident that access to technology alone does not guarantee success or profit. As Selwyn, Gorard, and Furlong (2005: 7) noted, how we use the Internet "means different things to different people and is used in different ways for different purposes." The use of the Internet and technology is indeed crucial, as it provides access to the vital resource of information and knowledge. Without these, one cannot adequately engage in social power relations or secure political, economic, and social prosperity (Ragnedda, 2017: 9).

Over the past decade, many researchers examining this issue have coalesced around the idea that even the aforementioned expansion of this academic domain does not provide a satisfactory picture of contemporary inequalities spawned by the Internet and ICT. Thus, a consensus gradually emerged that the digital divide should also be examined on a different level, which has only recently crystallized for scientific observation. If we assume that a given user has access to the Internet and ICT (the first level of the digital divide) and is even sufficiently competent and motivated to adequately utilize the available hardware and software resources (the second level of the digital divide), the question "Who derives measurable offline benefits from their online presence?" remains open for discussion and analysis.

Human life is divided into offline and online realms for purely operational scientific purposes, but in reality, people experience their personal lives as an amalgam of situations, roles, and actions. Therefore, it is essential to trace how our presence on the Internet acquires real value in offline reality. This is precisely the task of scholars who study the third level of the digital divide - how, why, and who derives tangible material benefits (in five specific areas - economic, social, educational, political, and institutional) in reality as a result of rational and purposeful use of ICT resources and the Internet (Van Deursen, Helsper, 2015). It is indisputable that many internet users possess the technical skills to navigate the online space, even to develop and utilize specialized knowledge in this direction. However, some can boast much better results from their online activities than others. Some even manage to become wealthy or famous (influencers) due to or thanks to the things they do on the Internet. Others actively participate in political life and accumulate political dividends, while

still others successfully educate themselves and subsequently attain better-paying professional positions.

It is evident that there is a divide at this level of use as well - some perform significantly better than others, derive more benefits for themselves, and prosper in various directions. The essence of the third level of the digital divide has not been well-studied so far, but observations exist that socio-economic and socio-demographic inequalities are likely reflected here as well. That is, social inequalities intertwine with the digital divide, and they mutually induce and reinforce each other. Nonetheless, the latter statement should not be accepted unreservedly, as some studies suggest that differences in the emotional experience of technologies and users' personal motivation may be a more plausible explanation for the various material benefits in the real world that some users derive compared with others (Gómez, 2018: 83-84).

Today, the first-level digital divide is relatively rare for the majority of the world's population. Currently, about 69% of the global population is connected to the Internet (InternetWorldStats, 2023). Africa and Asia are the continents with the lowest internet penetration - at 46.8% and 67.4%, respectively. As infrastructure issues, such as access to electricity, are resolved, they will gradually join the broader online community more fully.

The second level of the digital divide is more problematic. Many people have access to and use ICT, but the question remains what exactly they do on the World Wide Web and the devices at hand. Resource collateral is a central condition, but once it is met, it is entirely up to the users to decide what to do with their computers, laptops, tablets, phones, and internet access. Numerous observations show that many people have the opportunity to take advantage of technological progress, but either lack the skills to get the most out of it or do not even have the motivation to acquire the necessary skills. The topic of motivation is more significant than it seems at first glance, as there is data suggesting that emotional experiences and personal motivation (or lack thereof) play a role as barriers or facilitators concerning users' digital behavior. (Gómez, 2018: 83-84)

The third level of the digital divide is the most problematic. First, it is the least studied, and second, the differences between "winners" and "losers" have the potential not only to not decrease but to grow globally. This aspect of the issue focuses on the offline benefits derived from our online behavior. The Internet and technologies have become such a multifaceted and complex environment to navigate that not every regular user can fully benefit from them. At first glance, anyone can use a smartphone and surf the Internet and social networks, but this is just a very superficial use of sophisticated technology, which has the potential for much more. However, this potential is not evident and easy to find. Technologies are increasingly becoming non-intuitive and even highly abstract. Cryptocurrencies, blockchain technologies, virtual stock exchanges, artificial intelligence, deep fake - these are just some of the most apparent examples of high-profile technologies that usually require highly specialized knowledge from users. Such knowledge, in general, is not part of the skillset of the average citizen. Especially if we talk about people born

before Generation Z (before 1997). What's more, understanding and mastering these technologies is a laborious and complex process that many, realizing the level of challenge, would not want to undertake. It is in this way that the third level of the digital divide will continue to grow, and more and more people around the world will live as digital pariahs, deprived of the opportunity to prosper.

### **COVID-19 intensifies the importance of the digital divide**

All three levels of the digital divide have been strongly felt over the past three years. The COVID-19 pandemic has played a significant role in this development. Since 2020, work patterns and habits around the world have drastically changed, and technologies have started to play a disproportionately important and indispensable role for almost everyone. Nearly all human activities that could be organized in an electronic environment shifted to an online mode. Children and adults faced the challenge of performing their previous routine tasks in new conditions with the help of ICT. Education and all work processes that did not require a person's physical presence in a specific location were computerized, while trade, politics, interactions with institutions, and social contacts largely transitioned to online mode due to ongoing lockdowns around the globe. Even the cultural sphere experienced a renaissance on the Internet - numerous museums opened virtual exhibitions, concerts were performed in front of virtual audiences, and movies became almost exclusively home entertainment, whether through streaming platforms or other technologies for transmitting cinematic content to the home devices of internet users. The entire cultural industry changed (digitized) during the pandemic (Vecco et al., 2022).

The pandemic has largely subsided, although the virus has not disappeared and continues to claim human lives. Lockdowns, however, seem to be a thing of the past for most countries, and the world has attempted to return to more traditional forms of work, entertainment, business, socializing, and education. Despite this, most of the technological and social innovations introduced seem to have become a permanent fixture, and the world today no longer looks the same. Our habits, lives, and expectations of ourselves have also changed. Whereas being part of the online world was once partly a matter of personal desire and motivation, today there are expectations and even requirements for everyone to be able to survive and prosper in an electronic environment. Digital citizenship is no longer a privilege reserved for the most educated, affluent, or successful. It has become a global requirement for adequate "functioning" in the post-pandemic world we inhabit. Furthermore, these requirements and expectations will never be revoked and may even intensify. It is already clear that the next pandemic is not a matter of "if" but "when." It is only a matter of time before humanity faces another rapidly spreading virus that triggers a new wave of lockdowns and anti-epidemic measures. With a clear awareness of this scenario, all political and business actors expect the global population to be able to survive in a virtual environment when such a necessity arises again. This is precisely

why digital inequalities have transformed from a significant but relatively under-addressed issue to a central problem facing humanity, whether or not we fully grasp the extent of this transformation.

## **Media literacy**

Even before the pandemic, the media played an exceptionally important role in people's lives. The modern world is highly mediatized – the vast majority of our understanding of the world and the events occurring in it come from media sources. Before the advent of modern mass media, people's understanding of the world and life was mainly derived from their direct experiences, the cultural traditions of the respective local community, and to a minimal extent, from written texts. Since the emergence of the first newspapers, the media has gradually increased its influence on human life and become a primary source of information. For example, today, almost our entire understanding of politics comes from media sources rather than direct observations (Burudzhieva, 2022: 110). The same is true for other significant topics (e.g., COVID) on people's global agenda.

For this reason, the importance of media literacy has grown tremendously in recent years. Media literacy in the 21st century is a complex set of skills, knowledge, and values necessary for understanding and navigating the dynamic contemporary media landscape, which now includes not only traditional mass media but also social media and networks. It encompasses key competencies such as critical thinking, credibility assessment, target audience analysis, media creativity, ethics and social responsibility, and digital competence. Modern global citizens must be able to understand and analyze media messages, discerning the unspoken intentions of their creators, evaluating facts, opinions, and biases, recognizing disinformation and fake news among them, being aware of the audiences for which the media creates its messages and how this affects their content and presentation, understanding and using the digital media environment appropriately, among other skills.

Amid the raging COVID pandemic, the media began to play an even more critical role in people's lives worldwide. Traditionally, the media provides individuals with information that helps them navigate and understand the world around them and make decisions about their daily lives and overall existence.

During the coronavirus pandemic, media literacy and the recognition of disinformation became extremely important for a multitude of reasons. The pandemic triggered an influx of information that spread rapidly through various media channels, including traditional and digital. As a result, it became essential for people to understand how to analyze and evaluate the information received, especially when it concerns crucial decisions related to public health and safety. This process was dubbed "infodemic," effectively illustrating the connection between the rapidly spreading virus worldwide and the accompanying information.

In the context of the pandemic, it was also important to distinguish between factual information and opinions, as well as to recognize and evaluate scientific

sources and health experts. Not everyone producing media content on the virus and its containment was a legitimate and adequate source.

The pandemic led to a significant increase in disinformation and fake news, which had the potential to harm public and personal health. Media publications containing not only inaccurate but blatantly false information on the subject increased substantially. In such a situation, this was more than dangerous.

During the pandemic, it became crucial for people not only to understand the media adequately but also to use it responsibly, refraining from spreading unverified or false information. As the number of social network users is exceptionally high globally, inaccurate or fake information successfully found its way into the online space, reaching every corner of the planet rapidly.

During the pandemic, trust in institutions, scientific research (and scientists and experts in general), and the media, was critical to successfully coping with the crisis.

It is not an exaggeration to say that media literacy and the recognition of disinformation became extremely important during this period, as they helped people understand and evaluate the information they received, deal more successfully with disinformation, and act responsibly as media consumers and creators. The aspect of media literacy related to digital media and social networks – digital media literacy – was especially important (Austin, 2021). The series of lockdowns led to increased consumption of this type of media content, due to its easy accessibility from people's homes.

### **How (digital) media literacy amplifies or reduces the effects of the pandemic**

In September 2022, the annual report of the Open Society Institute - Sofia on the topic of media literacy was released (OSIS, 2022). Early in the document, it is noted, "The index assesses the potential vulnerability of 41 societies in Europe to the negative effects of fake news and related phenomena, using indicators for media freedom, education, and interpersonal trust" (Ibid.: 2). Since the level of media literacy in a society is difficult to measure with direct methods or tools, the non-governmental organization uses the mentioned indirect approach.

The report is largely focused on the problem of fake news and disinformation, as these phenomena have been particularly prevalent in public space in recent years. The ability to recognize disinformation or misinformation is crucial for a resilient liberal democracy. In the era of "post-truth," the role of facts was undeservedly diminished, with emotions, personal preferences, and attitudes becoming more determining in shaping public opinion. Amid the escalating political crisis in Bulgaria, combined with the raging COVID pandemic, the above observations led to concerns that low media literacy in the country, coupled with high levels of disinformation activities (and propaganda from Russia, for example), pose not only a threat to liberal democracy but also to the quality of life and the health of the population itself.

Media literacy index is based on four indicators - media freedom, education, trust, and new forms of participation. They have different importance, according to



the report, so they are included with different percentage weights when carrying out the measurement. Media freedom and education are disproportionately important, compared with the next two indicators. The purpose of this model is to illustrate the potential for resilience of the studied societies concerning disinformation and “post-truth.” “The basic assumption is that the level of education, the state of the media, the degree of trust in society, and the spread of new forms of participation illustrate the presence of media literacy.” (OSIS, 2022: 7)

The data from the report unambiguously indicate that the situation in Bulgaria is worrying. In the media literacy index, our country ranks 33rd out of the 41 states included in the observation. No EU country has a worse indicator. The list of countries is divided into clusters based on cluster analysis and groups countries with similar characteristics. There are five clusters in total, hierarchically ordered - from the best-performing group of countries (“Cluster 1”) to the weakest (“Cluster 5”). Bulgaria is in “Cluster 4,” with only Moldova, Montenegro, and Turkey behind it.

Leading Cluster 1 is Finland with 76 (out of 100 possible) points. It is followed by Norway (74 points) and Denmark (73 points). Last, 8th in “Cluster 1,” is the Netherlands (incorrectly referred to as Holland in the ranking) with 66 points. Germany, Iceland, and the United Kingdom are in the top three places in “Cluster 2” with an equal number of points - 62 each. “Cluster 3” is headed by Italy with 50 points, while “Cluster 4” (which includes Bulgaria) is led by Ukraine with 39 points. “Cluster 5” is topped by Albania with 25 points, and the last country in it is Georgia with 20 points.

As the report’s author, M. Lesenski, points out, a certain geographical pattern is easily observed. The leaders in the ranking are countries from Northern and Western Europe, with all Scandinavian countries, as well as the Netherlands and Ireland, falling into this cluster. The second cluster includes most countries from Western and Central Europe. The third cluster groups together countries from Southern and Central Europe, and the fourth largely covers the “extended” Balkans. “Cluster 5” is composed of four Balkan countries and one from the South Caucasus - Georgia. “The geographical patterns show an east-west and north-south divide, with the Balkan countries and the Caucasus lagging behind.” (OSIS, 2022: 11)

All of this is a clear sign that Bulgarian society is poorly prepared to face challenges related to fake news and disinformation. Weak functional literacy, problematic media freedom, and distrust among people, as well as the society’s distrust of institutions, lead to an inability to critically and adequately assess media content. In the context of a pandemic and a war that has started in Europe, the society is deprived of critically important skills and attitudes, causing tangible harm to the life of the community as a whole and individual citizens in particular.

How do these data correlate with other information on the state of (digital) media literacy in our country? Two reference points provide an idea of specific negatives that have affected the lives of Bulgarians in the last two years.

## *1. Financial/economic benefits*

The third level of digital divide examines the measurable offline benefits of our online presence. According to researchers on this issue, the main types of Internet uses from which users can derive offline benefits are grouped into the following five categories (partly containing subcategories, which we will not list exhaustively here) - economic, social, educational, political, and institutional uses (Van Deursen, Helsper, 2015).

Economic uses of the Internet are related to the ability of individuals to derive financial benefits from their presence on the Internet, broadly speaking. These benefits can be viewed on many levels, as the economic sphere is extremely comprehensive today. Online shopping for basic household and daily goods is at one end of the economic spectrum, while virtual stock trading and participation in index funds (or other complex financial instruments) are at the other end of the same spectrum. The potential economic uses of ICT are indeed numerous and their count is constantly growing (for example, blockchain technologies and cryptocurrencies). The ability and motivation of individuals to use ICT to derive personal financial offline benefits is undoubtedly a sign of at least two things - excellent digital media literacy and belonging to the “winning” side in the third level of the digital divide in society.

What data is available for Bulgaria? Since the potential economic uses of ICT are indeed numerous and diverse, as already stated, let us mention just two values. According to a study by “Paysafe”, an international online payment company, 68% of Bulgarians prefer to pay for goods ordered online in cash upon delivery. This value is almost twice as high compared to other European markets. The same study found that at least 20% of Bulgarians do not trust online payments and would not use them (Investor, 2021). At the same time, only 21.8% of Bulgarians made an online purchase in 2022, and only 10.7% used online banking (DataReportal, 2022).

These values are evidence that Bulgarians do not trust ICT and do not know how to economically take advantage of the opportunities available. Online trading and online payments/banking have been known and available for over two decades, yet only a small portion of Bulgarians trust them. This leads to missed economic and financial benefits on a large scale.

In comparison, Germans (for the same period) are in a much more advantageous position regarding the economic uses of ICT. Of them, 66.8% have made an online purchase, and 60.6% have used internet banking. Finns (the country that tops the OSIS media literacy rankings) are in a comparable position. 60.8% of them shopped online in 2022, and 80.1% used online banking.

Digital media illiteracy, combined with trust in yellow media, low functional literacy, and mistrust in society and institutions, makes most Bulgarians extremely cautious internet users. Various studies over the years (including Eurostat) also show that Bulgarians fear online scams, do not trust cashless payments, and have low digital culture and literacy. All these factors hinder the extraction of real offline economic benefits for a large percentage of the Bulgarian population. According to all studies (Eurostat provides different values than those cited above, most likely due

to different methodology and scope of the term “shopping”), Bulgaria ranks last in the EU in online shopping.

Since the lowest level of economic use of ICT is blocked in Bulgaria, it is a completely valid hypothesis that working with complex financial instruments and other forms of taking advantage of the opportunities provided by the Internet in an economic plan are even more poorly represented in the country.

## *2. Social/health benefits*

Social uses of ICT are another area in which the third level of digital divide clearly manifests itself. Some internet users take advantage of their online presence to accumulate various social dividends for themselves. And these dividends are tangible in the offline space.

One such obvious benefit is related to health. Technological advancements allow, for example, technologically literate (and motivated) internet users to take advantage of innovations such as e-healthcare or online examinations and consultations with medical specialists. But even without focusing on such avant-garde and still relatively poorly represented aspects of healthcare, it is more than evident that there are a number of other opportunities for ICT users to derive offline health benefits from their online presence. For example, people with good digital media literacy can check and gather adequate and relevant health information in the online space, which supports their healthy lifestyle and overall physical/psychological condition. The Internet contains a vast amount of information and data, some of which are useless, incorrect, false, malicious, or propagandistic, but others are scientifically based, adequate, contemporary, reliable, and authentic. Digitally literate users are largely able to distinguish between the two types of information and, if desired, find the correct information they need. Under the ongoing pandemic, threatening the lives of virtually every individual (albeit with varying degrees of probability), the stimulus to maintain a high level of health culture and to discover/use timely and expert information related to the spreading virus should be even higher. The speed at which information is transmitted on the Internet makes this environment a good starting point for searching for the most up-to-date and medically relevant information, while global medical authorities study and gradually better understand the nature of the new disease, its dangers, and the potentially most successful methods for preventing or fighting it. How not to get infected or, if we have been infected, what is the most reasonable thing to do, are extremely important questions, directly related to the sphere of social benefits that online users can derive.

One of the indicators that directly testify to the behavior of users in this direction is related to trust in coronavirus vaccines and vaccination rates. Bulgaria has the lowest vaccination rate in the EU. Approximately 30% of the population has a completed immunization cycle. In comparison, in Germany, this percentage is 76, and for Finland (the highest-ranking country in the media literacy index) 79. In Spain, as much as 87% of the population is fully vaccinated (NYTimes, 2023).

Partly due to the above result, Bulgaria leads in another sad statistic. It is the country with the highest “excess mortality” during the pandemic, due to the spread of conspiracy theories and distrust of vaccines ( $\approx 82,500$  people for the period 2020-2021) (BBC, 2022). The term “excess mortality” accounts for how many more people have died than would have been statistically expected for the same length of time before the pandemic. These are the “hidden victims” of the pandemic, not covered by the official statistical count of deaths from the virus.

This places Bulgaria in an anti-ranking concerning the consequences of COVID. The top five countries by excess mortality during the period 2020-2021 are: Bolivia, Bulgaria, Eswatini (Swaziland), North Macedonia, and Lesotho. In the media literacy index, North Macedonia is behind Bulgaria, ranking 40th out of 41 observed countries.

The comparison with leading countries from Northern and Western Europe is again very indicative. The exact excess mortality rate in Finland is unknown, but believed to be around 6,000 people, and in a total of five Nordic countries - Denmark, Finland, Iceland, Norway, and Sweden - is between 15 and 20 thousand for the same period (Kepp et al., 2022). In Germany, for this period, “excess mortality” is about 22,000 people, with scientists finding that it relates entirely to the age group of 80+ years (Baum, 2022). However, Germany’s population is more than 12 times larger than that of Bulgaria.

The above values again correlate with the low digital and media literacy of the Bulgarian population. The majority of ICT users fail to derive tangible and measurable social benefits from their online presence, thus exacerbating the digital divide of the “third level”. Due to belief in conspiracy theories, distrust in science, experts, and authorities, Bulgarians massively ignore public information campaigns related to the fight against and prevention of the disease, as well as calls from authorities to take advantage of newly created coronavirus vaccines. In addition, due to the weak media literacy of the population, disinformation and conspiracy theories are widespread in the Bulgarian online space. Adding the low scientific and functional literacy of a large part of the Bulgarian population, the result is very alarming and sad – thousands of Bulgarians lose their lives in the pandemic, and many others worsen their health due to the inability and unwillingness to take advantage of health advice and recommendations (which are abundant and accessible on the Internet) concerning the raging disease (Markov, 2023).

## **Conclusion**

In the era of digital capitalism, information overload, and the attention economy, the importance of digital inequalities and media (digital) illiteracy can hardly be overstated. The contemporary digital global citizen faces a choice – to be maximally digitally, media, and algorithmically literate, or to bear a multitude of negative consequences for his/her health, career, understanding of the world, and sometimes even life. The coronavirus pandemic has proven this in an indisputable and tragic way, although these conclusions had already started to become apparent even before it.

Bulgaria lags in terms of media literacy and digital competencies compared with all other EU countries. The difference is particularly noticeable in comparison with the leading democracies of Northern and Western Europe. Bulgarian society does not cope well with the challenges of the modern era. This trend is likely to deepen with the actual introduction of various types of Artificial Intelligence into public use. Technological and social progress will be further accelerated by this technology, which has only been publicly available for a few months but is already causing significant upheavals (and benefits, of course) in societies worldwide. If the Bulgarian social environment fails to change something in its development trajectory, its fate will become increasingly complex and difficult to predict. The path to positive change mainly goes through improving education (and critical thinking) at all levels and rethinking its significance by all members of society. Adequate state policies with a vision for the future are also needed to prevent our country from becoming the digital ghetto of the EU and the Balkans. The digital world has its rules and requirements. Our successful future demands that we recognize them in time, learn them, and abide by them.

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***About the author:*** Stefan Markov, PhD is Chief Assistant Professor at the Department of Stratification, Inequalities and Mobility at the Institute of Philosophy and Sociology at Bulgarian Academy of Sciences.

# The Digital Divide and E-Government Development in the 2023 Election Programs of Bulgarian Political Parties: Promises and Realities in the Wider EU Context

Martin Konstantinov

**Abstract:** *The digital transition is a transformative process that has the potential to revolutionize the interaction between citizens and their government. E-government is not only a powerful means of increasing the efficiency of processes in the administration, but also a tool for optimizing the processes of interaction between administration, employees, citizens and businesses through the use of e-services. Unfortunately, these benefits may not be accessible to everyone, which is valid to an even greater extent for Bulgaria, the country with the highest value of the inequality index of all EU member-states.*

*This article provides an overview of the election programs of leading Bulgarian political parties before the April 2023 parliamentary elections. Using quantitative and content analysis of the programs, we attempt to establish the degree of priority that individual parties place on digitalization and e-government development in Bulgaria. A special emphasis is placed on parties' focus (or lack thereof) on digital inequalities in Bulgarian society in the context of the three levels of the digital divide – access, skills and benefits. The findings are compared with those of relevant studies and with the vision outlined in EU strategic documents shaping the continent's digital future<sup>1</sup>.*

**Keywords:** digitalization, e-government, e-governance, Bulgarian political parties, election programs.

## Introduction

Electronic governance (e-governance) is the management in an electronic environment of normative interrelationships, administrative processes and services, and interaction with users, done by using statistical and mathematical models and methods of processing data, information and knowledge, and providing a much higher level of management effectiveness. E-governance is a means of comprehensively increasing the efficiency of processes in the administration, as well as easing the processes of interactions between administration, employees, citizens, business, through the use of e-services. (E-Governance Development Strategy 2014 – 2020 in the Republic of Bulgaria). The development of e-government contributes to:

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<sup>1</sup> This paper is written within the project “Digital Divide and Social Inequalities: Levels, Actors and Interplay”, financed by the National Science Fund, Ministry of Education and Science, KII-06 ПН55/7 or 2021-2024.

- a higher level of efficiency and effectiveness in government activities and processes;
- improving the quality of public services;
- simplification of administrative processes;
- facilitating and improving access to information;
- optimization of communication between different government agencies;
- strengthening public support for public policies;
- greater transparency and limitation of corrupt practices in the activity of the public administration.

E-government refers to the use by government agencies of information technologies (IT), such as wide area networks, the Internet and mobile data processing, that have the capabilities to realize connections with citizens, businesses and other government institutions (Chissik and Harrington 2004). E-governance is a broader concept than e-government, as it encompasses the use of information communication technologies (ICT) in a state's institutional arrangements and decision-making processes, and the implementation of all kinds of changes in relationships between the government and the public; e-government, on the other hand, seems to be essentially a subset of e-governance (Howard, 2001; Bannister and Walsh, 2002).

Although it has the potential to dramatically increase the quality of public services and improve the democratic process, there are also potential challenges to e-governance. One of the main concerns is the digital divide, where certain groups of people risk exclusion if government services are only available online. This study follows Ragnedda's (2017) approach to the **digital divide** as a three-level one. The first level is access to digital technologies. On the second level are inequalities with regard to digital skills, and the third level refers to the use of digital technologies, and the benefits derived from them. The third level digital divide focuses on the social and cultural benefits associated with the access to and use of the Internet, analyzing the offline returns of accessing and using digital technologies, and attempting to understand who gains the most advantage from the Internet (van Deursen and Helsper 2015).

Digital inequalities in their three dimensions – access, skills and benefits – are particularly acute in Bulgaria, where large social groups are at risk of digital marginalization and exclusion. Developed within the framework of the **“Digital Divide and Social Inequalities: Levels, Actors and Interplay”** research project, this study aims to establish the degree of priority of digitalization issues for the leading Bulgarian political parties, and to examine their declared commitment to the development of e-government services in Bulgaria and to the problem of digital inequalities that threaten the right of all citizens to equal access to digital administrative services.



## The present study

The study focuses on the party programs for the October 2022 and March 2023 early Bulgarian elections and follows two main lines of analysis:

- Quantitative analysis: examining the presence or absence of elaboration in the platforms of the individual parties on the topics of e-governance and digital inequalities;
- Content analysis: identifying the main topics and keywords related to digitalization in party programs and assessing the advantages and disadvantages of the proposed election platforms.

**The subject of the study** are the pre-election platforms of 6 parties and coalitions, for which polling agencies projected results around or above the four percent barrier for entering the National Assembly before the elections on 2 April 2023:

- **Bulgarian Socialist Party (BSP)** – left-wing, socialist;
- **Revival** – nationalist;
- **GERB coalition** – right-wing, populist;
- **Movement for Rights and Freedoms (MRF)** – liberal, voters predominantly from the Turkish minority;
- **There is such a people (TISP)** – new, populist, unclear ideology;
- **WCC-DB coalition: We continue the change (WCC** – a new centrist political formation) and **Democratic Bulgaria (DB** coalition of right-wing parties).

Of the 6 pre-election programs studied, the topics of digitalization, e-governance, modernization of the administration, digital transformation, etc., have been elaborated in detail only in two – those of GERB and WCC-DB. In their pre-election programs, the BSP, Revival, TISP touch upon separate aspects of digitalization, with some goals declared, but without specifically formulated policies and deadlines for implementation. These programs leave the impression that the political forces in question either do not consider e-governance important for their potential voters, and do not believe that developing it in the election program will enhance their electoral results, or lack the necessary expertise to identify the significant aspects of the subject of digitalization and to propose viable policies aimed at accelerating the application of ICT in the public administration.

Thus, our analysis will focus mainly on GERB and WCC-DB programs that discuss the topic of digitalization extensively, with stated goals, concrete policy proposals, deadlines and expected results. It is important to note, though, that even in those two most detailed platforms, explicit discussion of digital inequalities at each of the three levels is scarce, with the issue remaining mostly invisible to all political forces competing for the voters' trust.

### **I. Bulgarian e-government ranking and compliance with EU and Bulgarian strategic documents**

A number of documents at both the EU and Bulgarian institutions level detail the values and principles that e-governance development should comply with. The European Declaration on Digital Rights and Principles for the Digital Decade

proclaims that the digital transformation should leave no one behind, benefitting everyone, achieving gender balance, and including notably elderly people, people living in rural areas, persons with disabilities, or marginalized, vulnerable or disenfranchised people, and promoting cultural and linguistic diversity. The access to affordable high-speed digital connectivity for everyone, everywhere in the EU, including for those with low income, is a fundamental principle, enshrined in all EU strategic documents, along with the Union's commitment to ensuring that everyone has the right to high-quality digital education, training and lifelong learning and should be able to acquire all basic and advanced digital skills, especially with the aim of bridging the digital gender divide. Those efforts are targeted at allowing all learners and teachers to acquire and share the necessary digital skills and competences, including media literacy, and critical thinking, to take an active part in the economy, society, and in democratic processes. To that end, a commitment is made to promoting and supporting efforts to equip all education and training institutions with digital connectivity, infrastructure and tools giving everyone the possibility to adjust to changes brought by the digitalization of work through up-skilling and re-skilling.

In this document the European Parliament, the Council and the Commission also state their commitment to ensuring that everyone should have online access to key public services in the EU, and that no one is to be asked to provide data more often than necessary when accessing and using digital public services. A vital prerequisite for using digital public services, **digital identity or electronic identification (eID) that is accessible, voluntary, secure and trusted**, is also envisioned.

The EU eGovernment Action Plan 2016-2020 lists the three fundamental principles that digital public services provided by public administrations in the EU should be based upon:

1. **Digital by Default:** public administrations should deliver services digitally by default (though keeping other channels open for those who are disconnected by choice or necessity). In addition, public services should be delivered through a single contact point or a one-stop-shop and via different channels;

2. **Once only principle:** public administrations should ensure that citizens and businesses supply the same information only once to a public administration, and administration offices take action to internally re-use this data, in due compliance with data protection regulations, so that no additional burden falls on citizens and businesses;

3. **Inclusiveness and accessibility:** public administrations should design digital public services that are inclusive by default and cater for different needs such as those of the elderly and people with disabilities.

From this short mention of the main principles guiding e-governance development, it is evident that EU institutions are committed to ensuring that all EU citizens, with no exception, are included in the digital revolution and have the right to benefit from the opportunities that e-governance and online public services provide. In the next section recent data is provided that shows there is a significant gap between different EU member states in their efforts and outcomes when putting

these principles into practice. This is especially valid for countries like Bulgaria, which, although showing some positive tendencies, still lag behind the average EU e-government development level, with unsustainably high digital inequality scores.

Individual EU countries comparative data

The eGovernment Benchmark report 2022 provides data on the overall eGovernment maturity in the EU. The study uses eGovernment indicators that are aggregated and measured against the following fundamental pillars:

- 1. **User Centricity:** the extent to which information and services are available and supported online, and compatible with mobile devices;
- 2. **Transparency:** the extent to which service processes are transparent, services are designed with user involvement, and users can manage their personal data;
- 3. **Key Enablers:** the extent to which digital tools such as electronic identification (eID), eDocuments, Authentic Sources and Digital Post enable identification and communication between a user and a government service;
- 4. **Cross-border Services:** the extent to which citizens from other European countries can access online information and services in a usable and integrated way through electronic identification and eDocuments.

The overall maturity score is composed of the four key dimensions User Centricity, Transparency, Key Enablers and Cross-border Services. Figure 1 shows the digital maturity of all participating countries. Results in the EU states range widely

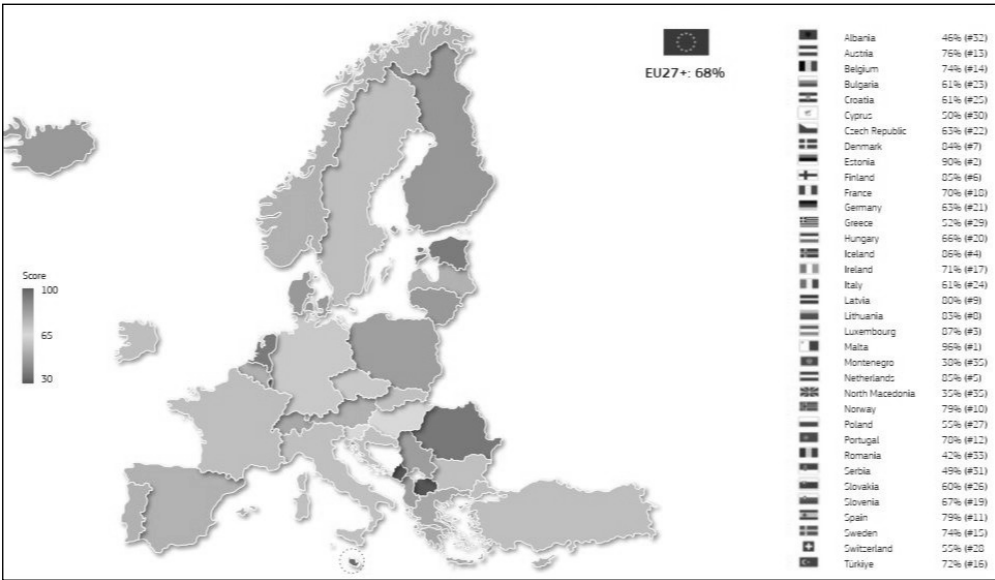
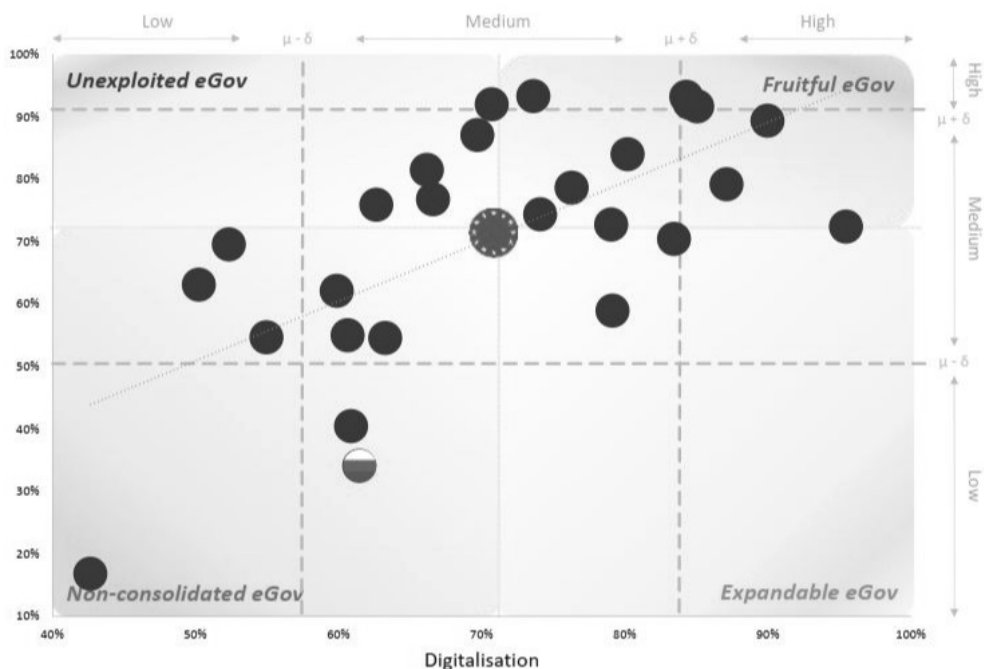


Figure 1. Overall eGovernment maturity in the EU27+

Source: eGovernment Benchmark report 2022



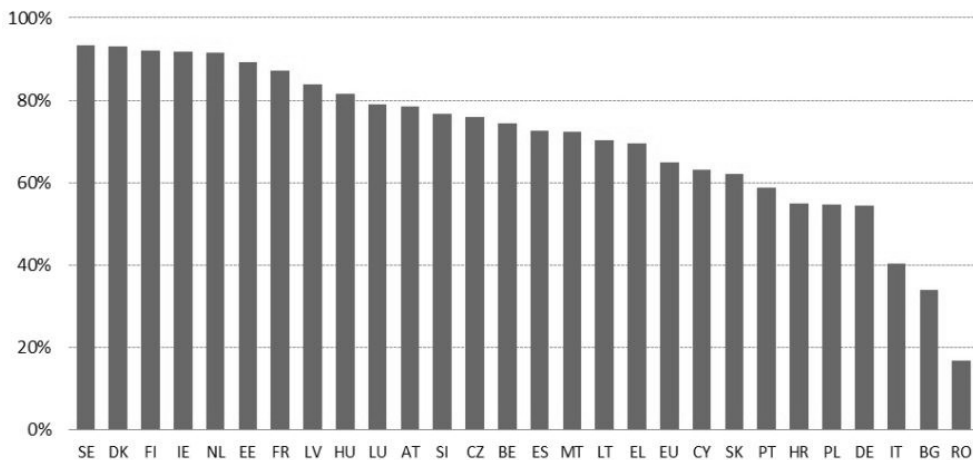
**Figure 2.** Digitalization and Penetration performance scatterplot showing Bulgaria's ranking

Source: *eGovernment Benchmark report 2022*

from Malta's most mature digital government at 96%, to Romania's underdeveloped one at 42%. As per the eGovernment Benchmark report, Bulgaria with its score of 61% falls in the Non-Consolidated eGov scenario, where countries are not fully exploiting ICT opportunities. The country is characterized by low performances both in Digitalization and Penetration (measured as eGovernment services availability and number of online users). With the level of Digitalization standing at 10 percentage points below the European average, the most significant gap lies in the level of Penetration, almost 37 percentage points below the European average (Figure 2).

The Digital Economy and Society Index (DESI) annual reports monitor Member States' digital progress and have been published by the European Commission since 2014.

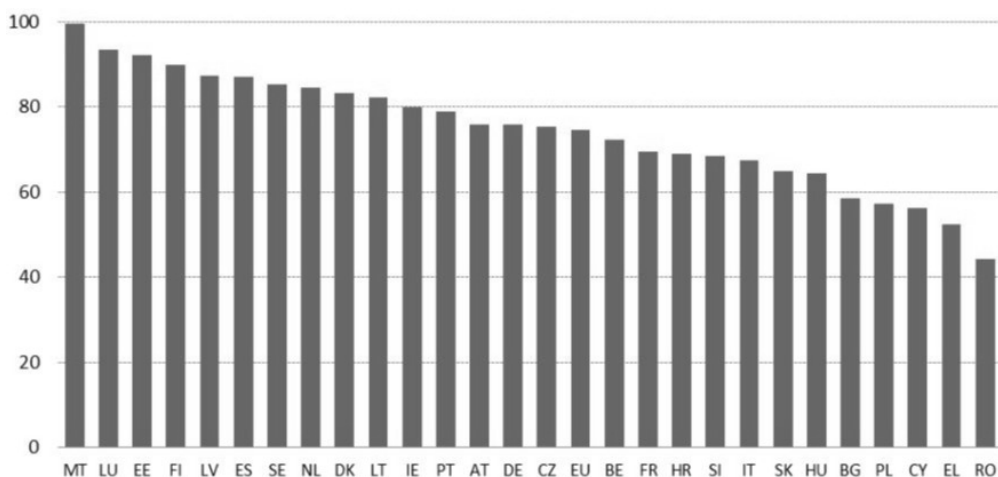
Data for 2021 show the member states' e-Government users scores. This indicator considers, out of all Internet users, the percentage of individuals who used the Internet in the last 12 months to interact with public administrations. Romania, Bulgaria and Italy occupy the bottom and are the only three countries where the percentage of citizens interacting with public administrations is lower than 50%. At the same time, in countries like Sweden, Denmark, Finland, etc., more than 90% of Internet users (aged 16-74 years) interacted with the public administration through government portals (Figure 3).



**Figure 3.** e-Government users interacting online with public authorities over the Internet in the last 12 months (% of Internet users), 2021

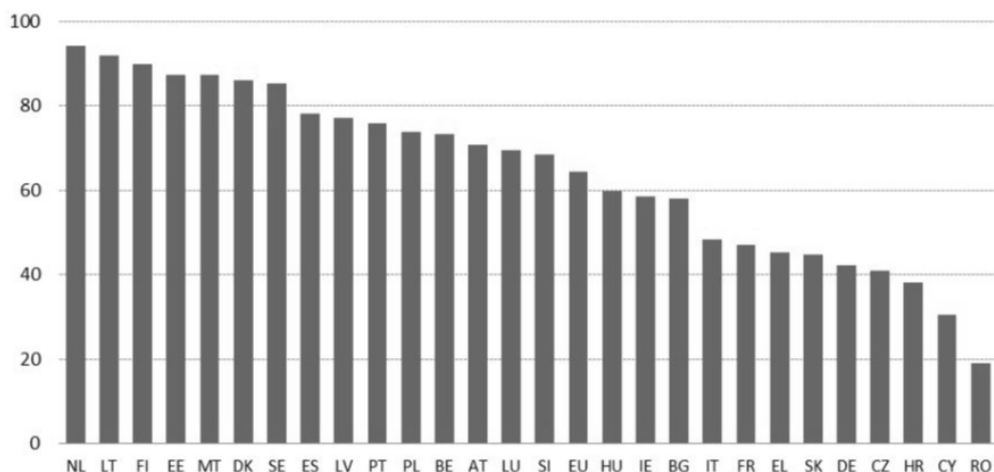
Source: Eurostat, Community survey on ICT usage in households and by individuals

The Digital public services for citizens indicator measures the extent to which a service or information on service for citizens is provided online via a government portal. This indicator represents the share of steps that can be done online for major life events for citizens. It is calculated as the average of the national and cross-border online availability for informational and transactional services. With a score of below sixty points Bulgaria is outperforming only Poland, Cyprus, Greece and Romania (Figure 4).



**Figure 4.** Digital public services for citizens (score 0 to 100), 2021

Source: eGovernment Benchmark, Capgemini



**Figure 5.** Pre-filled forms

*Source: eGovernment Benchmark report 2022*

Another key metric, the Pre-filled forms indicator, measures the extent to which data that is already known to public administrations is pre-filled in forms presented to the user. The use of interconnected registers is key to ensuring that users do not have to resubmit the same data to the public administration (Once Only Principle). The best performing countries in 2021 were the Netherlands, Lithuania, Finland, Estonia, Malta, Denmark and Sweden, with scores above 85 points. As with other indicators, there is a substantial gap between the best and worst performing countries, with Bulgaria's score of just below 60, close to the EU average, leaving behind nine EU countries (Figure 5).

This short selection of data from EU e-government studies clearly demonstrates the underdevelopment of e-government infrastructure in Bulgaria and the challenges that the country faces in its effort to reach the average EU level and extend digital public services to include the elderly, minority members, people living in villages and people with low income and disabilities. In the next section Bulgarian political parties' pre-election programs are subjected to both quantitative and qualitative analyses in order to determine their degree of commitment to bridging the digital divide and ensuring that every citizen enjoys the opportunity and convenience of using digital public services.

## **II. Pre-election programs – goals and policies**

Given the project's focus on digital inequalities in Bulgarian society, our analysis begins by establishing the frequency of mention of the main keywords of interest to us in the pre-election programs.

**Table 1. Items in the Digital inequalities cluster**

	Number of mentions	
<b>Keyword</b>	<b>WWC-DB</b>	<b>GERB</b>
digital divide	0	0
digital inequality	0	0
vulnerable groups/digital exclusion	0	0
access (to the Internet)	1	2
digital skills	2	6
digitally disadvantaged	0	0
benefits (from digital use)	0	0

**Table 2. Items in the e-Governance cluster**

	Number of mentions	
<b>Keyword</b>	<b>WWC-DB</b>	<b>GERB</b>
e-government	0	0
e-governance	3	3
digital by default	0	2
Digitalization	20	40
one desk	2	2
e-justice	1	1
e-registries	0	1
e-services	4	4

Overall, both coalition programs lack explicit discussion of digital inequality and the digital divide. However, both the GERB (6 mentions) and the WWC-DB (2 mentions) programs seem to acknowledge the importance of building digital skills as vital prerequisites for digital inclusion of large groups of people; hence, we could credit them for implicitly addressing the digital divide. Internet access is also mentioned in the programs of both leading coalitions, as is the case with different aspects of digitalization that are widely discussed in both programs, with WWC-DB mentioning it 20 times, and GERB twice as much. Both coalition platforms mention e-justice, one-desk services and e-governance at least once, but only the GERB program mentions a pillar of EU digitalization efforts, the “digital by default” principle. Unfortunately no reference is made to the state of penetration of digital public services in the country, as evidenced by European studies like DESI, and no goals are set of closing the substantial gap that separates Bulgaria from those EU countries that rank better in the e-Government maturity index.

## GERB digitalization priorities

The long-term governing GERB party has listed more than 20 priority goals concerning digitalization in the following main directions:

1. Digital economy (Investments for implementing digital technologies in business; Digitalization of public services used by businesses; Creation of European digital innovation hubs in Bulgaria);

2. Digital transformation and a more effective public sector (Comprehensive digital transformation of the public sector and society; Completion of the state registers reform; Continuing progress in e-government; Digitally empowering society; **Building digital skills**; Implementing electronic identification; Artificial intelligence; Institutional capacity; Attracting IT expertise from the private sector);

3. Data-based management (Increasing the capacity of institutions with responsibilities in the field of data; Creating modern tools for processing large data sets; Developing open data policy; Implementing the registry reform; Conducting a centralized registry policy; Centralization of key registers and inter-register connectivity; Digitalization of paper registers);

4. Zero live contact with the administration (Electronic services from start to finish – request, payment, receiving the service; Electronic request and payment for services and receiving the result with one visit to the administration counter; Facilitated and simplified procedures for requesting services; Official completion of applications and end of the applicant's provision of certificates from other authorities);

5. Digital municipality (Centralized solution for a paperless municipality (paperless back-office); Complete unification and standardization of municipal administrative services);

6. Development of next-generation e-services (Creation of proactive services; Services of the „episodes of life“ type; Development of cross-border services);

7. Implementation of key systems for e-governance (National Health Information System; **Proactive services for persons with disabilities**; Digitalization of the investment process; Electronic justice; Single entry point for submission of annual financial reports).

The program is evidence of its authors' awareness of the problems facing the digital transformation in Bulgaria, and the volume dedicated to digitalization in its pre-election program testifies to the fact that GERB acknowledges the importance of the topic for the development of the country. Another plus of the program is that for most of the goals and measures/policies, a specific deadline for implementation is provided – 2025.

From the perspective of our study, one of GERB's priority goals, building digital skills, is particularly salient. The authors of the program recognize the importance of the challenge to the education system, as well as to the policies of “lifelong learning” and professional education, to build new knowledge and skills in society. The significance of citizens' digital skills is taken into account, which, according to the GERB program,



*“...exceeds the sphere of e-governance and is expressed intensively also in citizen’s participation in the process of coordination and consultation of policies, in the transparency and accountability of management, as well as in the possibilities of providing feedback or signals and proposals concerning public services received.”*

The following measures are planned for building digital skills and increasing the penetration of digital public services among Bulgarian citizens:

*“Efforts to achieve this goal will also be made through information campaigns to facilitate access and encourage the use of various online resources and interaction channels maintained by the administration.”*

Financing to the amount of BGN 195 million is also planned for small and medium-sized businesses and technology companies for the introduction of digital systems and for increasing digital skills at all levels in enterprises.

Updating their 2022 pre-election program, GERB have added in their 2023 one the commitment to increase the digital literacy of Bulgarian society, with an emphasis on the uneducated, unemployed and inactive population, by building “digital clubs” in small settlements (for example, in community centers), in order to form basic digital skills, to increase the digital literacy of the population, with a focus on using online services, such as electronic banking, social services, etc. Yet, no mention is made of concrete policies that address building the basic skills specifically of elderly people and minority members, especially women of minority origin. The omission of keywords such as “digital divide”, “digitally vulnerable groups”, “unequal access”, “digitally lagging”, etc, also raises doubts about the extent to which the authors of the program are actually committed to correcting digital inequalities. Unfortunately, the same criticism can be directed at WWC-DB and the other parties. With that in mind, we still have to give GERB credit for including in their latest election program the “digital clubs in villages” policy, which seems a promising, if insufficient, step towards bridging the digital divide in the country.

A shortcoming of GERB’s campaign program is the lack of political commitment to experimenting with the introduction of electronic (online) voting. Related to this issue is the party’s opposition to machine voting and the drive to preserve the paper ballot. The possibilities for manipulation of the “paper” vote are well known, and doubts arise among observers about the political will of the GERB party to conduct fair and transparent elections, providing Bulgarian citizens with all modern opportunities to exercise their right to vote.

### **WWC-DB digitalization priorities**

Among all the pre-election programs, those of the 2023 WWC-DB coalition and the 2022 DB platform, discuss digitalization in most detail, which is to be expected given the priority DB parties traditionally place on the problems of digital transformation, administrative and judicial reform, as well as the technocratic profile

of a number of political figures in the coalition.<sup>2</sup> We should highlight the coalition's commitment to introducing electronic or online voting – a measure advocated, besides WWC-DB, only by the pre-election programs of TISP. It is obvious that coalition parties strive to meet the expectations of their sympathizers, as well as of all citizens, for whom the modernization and comprehensive optimization of public administration is an urgent priority. Below we will list the main policies envisaged by the **WWC-DB** program aimed at reaching the stated goal of the development of fully functional and mature e-governance in Bulgaria:

1. Standardization of processes and construction of e-identification and e-signing components; Upgrade of available electronic services and settlement of a federated model for electronic identification with the aim of easy, fast, remote access to electronic administrative and health services;

2. Eliminating the requirement for stamps and paper documents in administrative services and eliminating the need to issue and provide certificates on the territory of the country, ensuring compliance with the requirement for a **one-time collection of information in all administrations**;

3. **Provision of any administrative service electronically** at both central and municipal level, including through unstructured channels (secure electronic delivery system, electronic forms system, e-mail), and sanctions for the administration in case of refusal to provide administrative services electronically (**Digital by default**);

4. Building stable and convenient **cross-border e-services for citizens of the European Union** and introducing **“e-citizenship” based on the national e-identification scheme**;

5. Development of the national health information system;

6. Introduction of a single entry point for announcing financial statements;

7. Electronic employment file: digitalization and a step-by-step phase-out of paper employment records;

8. Preparation of amendments to the Territorial Planning Act and launch of a project for full digitalization of the investment planning process;

9. Introduction of user experience tests to increase the convenience of services. Improvement of the centralized portal for electronic services and synchronization with the administrative register;

10. Introduction of tools allowing active and convenient **participation of citizens in public debates and in the processes of making political and administrative decisions**;

11. Creation of a mechanism for conducting regular **focus groups with citizens and businesses** to specify the **needs and goals of specific initiatives within the framework of e-government**;

12. Launch of a project to build experimental **remote electronic voting**.

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<sup>2</sup> The 2022 WWC program lacked a consistent digitalization platform, but since WWC formed a coalition for the 2023 elections with DB, the joint program has incorporated most of DB's ideas on the digital transformation.

Apart from these detailed e-governance policies, the coalition parties' 2022 and 2023 programs also contain elaborations of digital solutions for Bulgaria's chronic transparency and corruption ailments, as well as concrete policies for digitalization of registries and for a significant upgrade in the state's cyber security. The coalition's detailed digitalization program testifies to the high priority the coalition parties place on e-governance and the modernization of all state government systems in order to meet both the demands of the digital transformation and the high digitalization standards set forth in EU strategic documents, standards that have already been achieved by the most digitally advanced member states. The commitment to digital-by-default administrative services and cross-border e-services for citizens of the European Union demonstrates the parties' understanding of EU principles, and knowledge of EU digitalization strategies.

The mention of the implementation of electronic identification as a priority is particularly significant. Although the Law on Electronic Identification was adopted in 2016, it has not yet been implemented in practice in Bulgaria, and by the end of 2022, Bulgaria and Cyprus are the only EU member states that do not have functioning electronic identification (digital identity card containing a chip with the personal information of each citizen); this significantly restricts the number and scope of possible electronic services provided.

WWC-DB's digitalization program is detailed enough and expertly written, and yet the coalition failed to include in it measures to reduce digital inequalities. Having declared their ambition to offer qualification programs, additional professional and postgraduate qualification and retraining in order to increase "financial literacy and digital skills", the goals of the coalition parties seem aimed at correcting labor market disbalances and the active population's life chances, with retired people's digital skills apparently remaining under the radar in the WWC-DB coalition platform.

## **Discussion and conclusion**

In a clear sign that digital public services in Bulgaria are developing, according to official data, over a period of 3 years, the number of Level 3 and 4 electronic administrative services (EAS) provided by central and local administration bodies has increased seven-fold. According to the report of the "Electronic Government" State Agency, as of 31.07.2019, the administrations offered 38,063 services. To meet the EU standard for "digital services", they must be Level 3 (requesting and receiving services entirely electronically) and Level 4 services (dealing and/or transacting on Level 3 services). These two levels were covered as of the above date by only 1,961 services. That is, just over 5% of all administrative services that bear the "electronic" label are actually such. A reference in the Administrative Register of the Integrated Information System of the State Administration shows that, as of 10.11.2022, the number of Level 3 and 4 electronic administrative services (EAS) offered has grown to over 14,000.<sup>3</sup>

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<sup>3</sup> The 14,000 figure leaves some doubts, as our recent attempts to access some random services online were not successful.

Despite these optimistic statistics, from the point of view of digital inequalities, we unfortunately do not have data on the number of citizens at risk of digital exclusion who have started using EAS. It is worrying that only two of the parties mention in passing in their programs the need to increase the digital skills of social groups at risk of digital exclusion. Even the most ambitious intentions in the field of digitalization would ultimately fail if state institutions ignored the digital divide's profound implications. The accelerated digital empowerment of those citizens who are not yet able to take full advantage of the opportunities provided by the digital transformation, should be a central priority in political digitalization platforms. Our main recommendation is in this direction: the need for timely measures to increase the digital literacy of large groups of the Bulgarian population threatened by digital exclusion and marginalization, through a large-scale social program promoting and offering free digital education in all 265 municipalities of the country.

Some optimism comes from the fact that both leading coalitions recognize the importance of e-governance and have proposed goals and concrete policy measures that comply with EU principles and best practices. However, genuine commitment to tackling the digital divide at all three levels is still lacking. Both leading parties' commitment to the further development of effective digital public services, to digitalizing registries, and to one-desk service, are commendable, but if large social groups like pensioners and minorities remain mostly excluded, the lofty principles proclaimed at the highest political level in the EU will remain but empty slogans in Bulgaria. It is still to be hoped that, eventually, the rapid progress in e-government development will either lead or trickle down to an increased awareness of digital inequalities in the country, prompting long-overdue measures to be publicized and implemented in order to reduce them.

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***About the author:*** Dr. Martin Konstantinov is Senior Assistant at the Institute of Philosophy and Sociology at the Bulgarian Academy of Sciences.

**PART III:**

**Smart Europe and its People**





# Quality Education and Training for All Challenges of the European Education Area in Times of Multiple Transformations

Wolfgang Schuster

**Abstract:** *The article discusses the quality of education and training in the EU member states and in Europe. The author places the topic of education and training in the context of megatrends such as globalization, digitalization, demographic crisis and climate change, arguing that the pressure on the education system is extremely high and unprecedented. In light of these multiple transformations, the author puts into discussion whether and how education can be designed to support and lead to sustainable development. Such a goal presupposes that the European education and training system itself should be sustainable and consistent in order to be productive and effective for the EU and European youth.*

**Keywords:** education, training, VET, European Education Area (EEA).

## *(1) Education systems under pressure*

Education is traditionally an important sphere of the national legal jurisdiction of all member states. But due to the Common Market and the freedom of mobility, the freedom to work in different European countries within a common labor market, it will be important to develop comparable standards of knowledge and competencies in all member states. At the same time, all EU states are facing similar challenges in education.

The concept of European Education Area is oriented to creating a more cohesive and harmonized system of education in the EU countries, with the vision to develop a “Europe of knowledge” that is competitive and attractive on the global stage. To promote this vision, the EU is supporting cooperation and networking, mobility and exchange of knowledge.

Our education systems should be learning systems – because they are not islands. On the contrary, they are interconnected with the cultural, social, political, economic and ecological environment and dependent on the preconditions, megatrends and transformation processes of that environment.

We are all touched and challenged by the war in Ukraine and the consequences of this awful war. Our kindergartens, schools, higher education and vocational training institutes are working hard to integrate the refugees from Ukraine in our educational systems and labor markets.

Due to this war, to climate catastrophes and the COVID-19 pandemic, people all over the world have become aware that our living conditions are volatile, insecure, complex and ambivalent. We experience multiple transformations driven by



global megatrends. By this term, I specifically mean economic changes caused by globalization, technological changes driven by digitalization, demographic and social changes, and climate and ecological changes.

In the following section I shall further outline in detail the specifics of each of these megatrends. My intention is to highlight the positive as well as negative aspects that each of these megatrends might have on a global scale and in societies.

## **Globalization**

Globalization causes and promotes global economic competition, transparency of markets, products, services and living conditions, the open flow of information and exchange of ideas by a population with growing international experience. But it also leads to increasing dependency on global supply chains that may involve potential mishaps and delays; and on political influences leading to unfair regulations. We experience a growing competition for high potentials among well-selected people, across open borders, on the one hand, and closed borders for the increasing number of poor migrants and refugees on the other.

## **Digitalization**

Digitalization is changing the modes of personal, social and political communication, of work, production and consumption. Data analytics and artificial intelligence are producing new economic values for some; however, a significant number of existing jobs will be lost due to automation in production processes and services. Many researchers (for instance, Warschauer 2002, 2003) rightly acknowledge the existence of a “digital divide”<sup>1</sup>. The term refers to the gap between those who have access to digital technologies like computers and the Internet, and those who do not. It refers not only to access to technology but also to the ability to use technology effectively to access information, communicate, and participate in digital society. The digital divide is often associated with social and economic inequality, as those who are disadvantaged in other areas, like education and income, are also more likely to lack access to digital technology. The term is used to draw attention to the need for policies and initiatives that address this inequality and ensure that all individuals have access to the opportunities afforded by digital technology.

The digital media and artificial intelligence are demanding and creating new pedagogical and didactic ways of teaching and learning. They could help during

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<sup>1</sup> The term “digital divide” was first coined by Lloyd Morrisett and his colleagues in a 1985 report for the Carnegie Foundation, titled “Television and the Public Interest.” However, it was popularized by a Mark Warschauer’s article from 1995, which brought attention to the growing gap between those who had access to digital technology and those who did not. Since then, the term has been widely used to describe disparities in access to technology, particularly with respect to the Internet and other digital tools.

times of pandemic time, providing teachers are sufficiently trained and experienced in the use of digital media for teaching the curricula. Unfortunately, in many parts of Europe, the media competencies of teachers proved insufficient. The vision for the future continues to be that better chances will be opened for a fairer education system for all. The COVID-19 pandemic, more than any phenomena before it, showed that Mark Warschauer (2003: 6) was right when he noted, “The digital divide is not simply a matter of who has access to information technology and who does not; it is also a matter of how information technology is used, and by whom. The challenge is not just to provide access to the technology, but to ensure that it is used in ways that empower people to participate fully in social, economic, and political life”.

### **Demographic and social changes**

The population of the EU member states is aging. Several data underpin this trend. According to Eurostat, the statistical office of the EU, the share of people aged 65 years or over in EU-27 population increased from 19.3% in 2010 to 20.7% in 2020. This trend is projected to continue, the share of people aged 65 years or over being expected to reach 29.1% by 2050. The median age in EU-27 has increased from 39.6 years in 2010 to 43.2 years in 2020. In some EU member states, such as Italy and Germany, the median age is even higher, at 47.3 and 45.9 years respectively. The old-age dependency ratio, which measures the number of people aged 65 years or over per 100 people of working age (defined as those aged 15-64 years), has been increasing in EU-27. In 2020, the old-age dependency ratio was 31.9, up from 26.5 in 2010. This means there is a greater number of older people relative to the number of people of working age, a ratio that may put pressure on social welfare systems. The population of the EU member states is indeed aging, with implications for social welfare systems, healthcare, and the labor force; with a low birth rate becoming more heterogeneous in terms of cultural, religious and ethnic diversity and increasing inequality between rich and poor.

Amidst the flow of refugees and asylum-seekers, the EU member states need a high number of young qualified immigrants for the labor markets. The integration of the new migrants represents a specific challenge for the whole education system. The digital media can be supportive with regard to improving the migrants’ language skills, their understanding of life in the local society, and the process of their integration in the job market.

### **Climate change and ecological protection**

In many regions of the world, the changing climate has caused heavy floods, droughts and aridity that force people to leave their home regions. In consequence, we will face a growing number of climate refugees. According to the Internal Displacement Monitoring Centre (IDMC), climate-related disasters such as floods, storms,

and wildfires were the leading cause of displacement in the year 2020, resulting in a total of 30.7 million new displacements globally. A study by Donat, M. G., et al. (2017) found that, in many parts of the world, climate change had increased the likelihood of extreme rainfall events that could lead to floods and, hence, displacement. The study estimated that, between 1981 and 2010, climate change had caused an additional 27,000 square kilometers of flooding per year. In many parts of the world, changing climate patterns are also leading to more frequent and severe droughts, which can cause crop failures, water shortages, and displacement. For example, in the Horn of Africa, a prolonged drought has led to food insecurity and displacement for millions of people. The number of people displaced by climate-related events is expected to continue to rise in the coming decades. The World Bank has estimated there could be as many as 140 million climate migrants by 2050 if global warming were to continue at its current pace. Therefore, it is crucial that all countries able to contribute in a sustainable way to fighting the climate crisis become more active.

The European countries have a clear goal: for Europe to be the first CO<sub>2</sub>-free continent in the world by the year 2050. The ecological transformation of our lifestyle in the Western-oriented societies and of our economy is not only a technical and financial challenge; it is also a process of social and cultural change towards a different mindset. We have to achieve a different way of life and production among the large majority of citizens and companies, including a strongly reduced natural-resources consumption based on a circular economy and, ultimately, zero CO<sub>2</sub> emissions – goals that involve very demanding technical, scientific, economic, political, cultural and specific educational tasks.

The analysis of the impact and role of the megatrends highlighted above on education shall be the focus of our discussion in the following section.

## ***(2) Education for sustainable development***

How to proceed with these changes? How to orient ourselves and our children in this respect?

The 17 goals of the UN Agenda 2030, which are a commitment for all countries, can be helpful guidelines – specifically goal No. 4: Quality education.

But what competencies do we need in order to ensure the transformation processes will go on in a socially, economically and ecologically sustainable way? In order to overcome the fears and worries that quite often provoke resistance to all these changes, we need information and communication, but above all, to implement a campaign for education, particularly for vocational education and training, that will prepare open-minded and qualified people for new professional tasks.

This educational challenge should be designed in the spirit of **education for sustainable development**, which always includes the social, economic and ecological dimensions of sustainability. Therefore, three educational goals should be achieved for everybody:

- Everyone should get the chance to develop his/her talents, to use his/her skills, for achieving professional qualification and for living in a responsible way.
- Everyone should learn how to learn and adapt to new situations throughout his/her life.
- Everyone should be able and willing to take responsibility for our community, our society and our environment.

To achieve the three goals, we have to develop and work with some new characteristics of a **sustainable education system**:

1. Teaching and learning processes should dialectically link together, in a systematic way, the following:

- Basic knowledge and problem-solving skills
- Expertise and understanding the interconnections between elements
- Theory and practical experience
- Analogue and digital forms of learning
- Individual studies and cooperative learning in teams
- Independent work and team-based activities
- Personal cultural identity and inter-cultural comprehension
- Self-reflection and social interaction

2. Educational opportunities for lifelong learning should be available for all, by providing:

- Early-childhood education in the kindergarten
- Differential forms of schools focusing on different subjects
- Multiple vocational training opportunities at school and university level
- Lifelong learning in professional life – supported by the employer
- Informal learning opportunities provided by public libraries, community colleges and the digital media.

3. New ways of learning should be implemented:

- E-learning with no constraints in terms of space and time
- Individual and cooperative learning through design thinking
- Active roles of pupils and students in solving problems individually and in a team
- Explaining and exploring the connection between different disciplines
- Learning by doing through the combining of theory with practical activities.

### *(3) Contributions of the European Education Area*

The European Education Area (EEA)<sup>2</sup> is an initiative of the European Union that aims to create a common framework for education and training across the EU member states. The EEA is intended to promote excellence, equity, and mobility in education, and to support the development of a knowledge-based economy in Europe.

The EEA was first proposed by the European Commission in 2017, as part of a broader effort to strengthen the EU's social and economic cohesion. The initiative is based on the principles of inclusiveness, innovation, and digitalization, and it seeks to build on existing European frameworks for education, such as the European Qualifications Framework and the Bologna Process.

The EEA has several main objectives, including:

- To ensure that everyone in Europe has access to high-quality education and training, regardless of their background or circumstances.
- To promote the recognition and validation of skills and qualifications across borders, to facilitate mobility and employability.
- To support the modernization and digitalization of education and training systems, to better prepare learners for the challenges of the 21st century.
- To foster cooperation and exchange among education and training providers, researchers, and policymakers across Europe.

The EEA is still in the process of implementation, and its impact on education and training in Europe remains to be seen. In any case, it is a significant initiative which reflects the EU's commitment to promoting education and social inclusion as key drivers of economic growth and prosperity.

How can the European Education Area contribute to the goals indicated above?

In the following section, I try to identify the added value of the EEA to the goals and objectives posed in the context of the global megatrends:

- Improving mobility and Exchange:

The Erasmus programs facilitate the mobility of students in universities and professional schools, and of teachers and researchers, by providing study in different countries and creating new opportunities for learning and cooperation.

- Enhancing quality and transparency:

The European Credit Transfer and Accumulation System (ECTS) facilitates the recognition of credits earned in different countries, and the European Quality Assurance Register for Higher Education (EQAR) promotes transparency and quality of higher education.

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<sup>2</sup> For more about the European Education Area (EEA), see: <https://education.ec.europa.eu/about-eea/the-eea-explained>.

- Stimulating competitiveness and cooperation:

The European Higher Education Area (EHEA) creates a common framework for higher education within the EU, and the European Research Area (ERA) supports cooperation and networks within the research community.

All these regulations for standards and mobility, and exchange programs are useful instruments for achieving better common understanding and for the EU integration process. Moreover, perhaps they will contribute to making our universities and research institutes more attractive for excellent talents worldwide. But there are many obstacles and disadvantages arising from a “cohesive and harmonized” system of education and training in Europe. I will outline some of them below:

- Differences in national systems:

Until now, there have been good reasons for every country to have legal jurisdiction to develop its own education system. Educational structures and contents are linked with history, traditions, cultural values, economic and social developments, political priorities and financial resources. Apart from the difficulties of reconciling the different approaches and traditional systems of the various countries, the goal of a “cohesive and harmonized system of education” in Europe could hardly correspond to the changing educational needs and challenges in our plural, heterogeneous societies.

- Reduction of cultural diversity:

A specific strength of the EU is its cultural diversity, including the multiplicity of languages. Different ways of thinking and speaking in various cultural environments are important sources for creativity and innovation. In any case, the introduction of artificial intelligence could lead to a more standardized way of thinking learning and evaluating.

- Reduction of competition between different educational systems:

Our educational systems are in a competitive situation, as exemplified by the PISA studies.

The requirement for transparency creates a political and public pressure to compare the results of countries and improve the national systems. We need a learning educational system with flexible and adaptive structures as well as competencies and responsibilities of the institutions and their agents. To harmonize the curriculum study programs of teachers and students would be a never-ending story, and meanwhile, the preconditions and contents of learning are continuously changing.

But nevertheless, the EEA is and can be a useful tool in providing fairer chances for young people in many EU countries by supporting corporations, mobility and exchange of knowledge and experiences.

#### ***(4) Reducing youth unemployment, improving sustainable economies***

One important contribution to learning from one another is provided by the Strategies for reducing youth unemployment. Youth unemployment is very high, particularly in southern and southeast Europe. The economic situation is such that millions of young people cannot develop and practice their talents and skills.

On the other hand, all countries with education systems that are linked in different ways to real life, specifically, to the labor market, have significantly less youth unemployment, higher competitiveness of companies, better-paid jobs, less brain drain and a stronger regional economic development. The German-speaking countries Switzerland, Austria and Germany have a long tradition in linking education, science and research to economic development, starting from schools, particularly vocational schools. Apprenticeship combines school lessons with half-time paid training in the company. Universities are working together with companies to offer students internships and dual study programs with half-time paid training in the company. In Germany, research institutes like the Fraunhofer Institutes and technology transfer centers like the Steinbeis Center cooperate closely with companies and even small businesses, and support startups.

- The Osnabrück Declaration 2020 on Vocational Education and Training (VET)

The Osnabrück Declaration, as an enabler of recovery and just transitions to digital and green economies, was signed by all ministers in charge of vocational education and training of the EU member states, EU candidate countries, and the EEA countries, and by the European social partners and the European Commission. The declaration focuses on four main areas for the years 2021 to 2025:

1. Resilience and excellence through quality, inclusive and flexible VET

New technologies, new business models, digitalization, artificial intelligence, demographic change, climate change, and the economic problems caused by COVID-19 demand flexible responses from VET systems with appropriate governance. Flexible and resilient VETs are able to adjust to disruptions, enable innovation, and promote the productivity and resilience of our economies and societies.

Digital learning and artificial intelligence can support learners by developing their knowledge, skills and competencies. The labor market requires a different mix of skills and qualifications, and hence, structural changes in the VET landscape. The role and scope of VET institutions are changing the competition in higher education, and VET systems are offering their graduates flexible, inclusive, valuable paths to high-level jobs and career opportunities in response to the current and future socio-economic needs.

All these movements for training for high-skilled work in a real-life environment requires the development of consistent long-term policies by governments, willingness on the part of professional educational institutions, a strategy for sustainability, and the long-term commitment of companies.

2. Establishing a new relevance of VET and digitalization for a culture of life-long learning

As job and qualification profiles change and new professions emerge in the course of the digital and green transformations, individuals need support to continuously enhance and update their skills.

Institutional VET (IVET) and continuous VET (CVET) offers should be better interlinked, made compatible with, and be based on, skills intelligence at European, national and regional levels. A lifelong learning culture implies that individuals benefit from career guidance throughout life, engage in good-quality and inclusive VET programs, and acquire key competences to actively manage their education, training and employment phases, with the support and increasing responsibility of all stakeholders.

To achieve this lifelong learning culture, dedicated teachers, guidance, counselors, trainers, and mentors, who benefit from continuous high-skill professional development, should act as its multipliers and mediators.

### 3. Sustainability - a green link in VET

Sustainability, as a transversal task, intersects with labor demand, education, skills, occupation, and geographical distribution of jobs and workers. The link between digitalization and sustainability is central for green growth. Developments in technologies drive the growth of sectors, including education and training. The development of open-source and digital learning environments can make education for sustainable development more accessible in educational and training settings in schools, companies and at home.

### 4. The European Education and Training area and the international dimension of VET

The demographic trends and the globalization of markets call for modernization and adaptation of VET systems and institutions at national, regional and sector levels.

Transparency and comparability of qualifications and competencies help education and training providers, employers, and individuals to make informed choices and decisions.

Mobility in VET has increased over the last two decades, with more than 1.5 million VET learners and staff having benefited from Erasmus + mobility.

Against the backdrop of demographic change, the cross-border mobility of skilled workers and professionals will improve the matching of supply and demand in the labor market.

Based on common quality criteria and on the promotion of the recognition of VET learning outcomes, a European VET system as a common European education and training area could become a worldwide reference for vocational learners.

This declaration demonstrates again that we do not lack knowledge of the needs and necessary activities involved, but there is an increasing gap between our knowledge and its implementation in our reality.



- EDU- LAB - the EU Interreg project for reducing youth unemployment and improving sustainable economic development<sup>3</sup>

As former Mayor of the city of Stuttgart and President of the Council of European municipalities and regions (CEMR), in 2013, I established the European Foundation for Education with the goal to fight youth unemployment and to improve sustainable economic growth in the European countries with high unemployment.

In contrast to many regions in southern and south-eastern Europe, in the regions of Munich and Stuttgart we had more jobs than there were young people. A main reason for this is that our education system connects education to social, technical and economic realities.

One of the consequences is the brain drain of talents to our regions. That is why the European Foundation for Education applied for EU support that could help change this situation.

The EDU-LAB project was funded by the EU as part of the Danube Transnational Program under the title “New Danubian Governance in Labor Market Relevance of Higher Education”.

From 2017 to 2019 we worked together with 27 partners from more than ten countries to achieve four interlinked goals:

- Creating better chances for young people in their home region through dual professional education

- Implementing practice-oriented study programs and enhancing entrepreneurship competencies of professors and students

- Improving the competitiveness of companies in the region through the higher qualification of young people

- Contributing to regional economic development through new investments of companies based on higher professional qualification of the young people.

As the majority of young people in the Danube region go on to study in universities, the EDU LAB project focused on higher education.

To achieve concrete sustainable results, interconnected partnerships of four stakeholder groups are needed; these are: the universities, the business sector, the public authorities and civil society.

The transformation processes recognised as necessary, are:

- Changing policies

To allow universities to offer dual study programs in order to cooperate systematically with the private sector.

Some countries (like Hungary and Serbia) changed their legal frameworks; some governments (like those of Bulgaria and Slovakia) allowed the universities to implement dual study programs.

- Changing the business culture

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<sup>3</sup> For more information about the EDU-LAB project, visit the webpage [www.interreg-danube.eu/edu-lab](http://www.interreg-danube.eu/edu-lab).

Dual study programs are not just small internship programs. Hence, the business sector must make a binding, long-lasting commitment based on a business culture imbued with the spirit of social responsibility.

The first professional bachelor program was developed by the Technical University of Bratislava in cooperation with the German-Slovakian chamber of Commerce and Industry, the Automotive Industry Association in partnership with Volkswagen-Bratislava, and other automotive suppliers.

Another example of new dual study programs is those offered by the University of Kecskemet in Hungary in cooperation with the Mercedes plant, which needed 4,000 qualified employees (for the experience of other countries see also Jeleva 2021).

– Change of university curricula

By respecting the freedom of science and research, we could stimulate a number of universities and professors to change their lectures programs and cooperate with the business sector so as to combine theoretical with practical studies and collaborate with applied sciences.

–The creation of networks by NGOs

NGOs, as network builders, can connect the different partners in a sustainable way.

That is why EDU-LAB supported the creation of national institutes for professional education that would include different stakeholders in the transformation process towards a new Danubian governance model of higher education.

• The Danubian Charter for Young Talents<sup>4</sup>

Based on the concrete results (like learning tools), pilot activities and lessons learned, the partnership consortium within the EDU-LAB project developed the **Danubian charter for young talents**, which includes five concrete steps within the Danube region: a common mission, common vision, implementation strategies, culture of cooperation and participation, and common commitment. This charter was signed by all 27 Partners from ten countries, including five governments. The European Commissioner for Regional Policy, Ms. Corina Cretu, distinguished the EDU-LAB project as one of the best examples of how EU cohesion policy concretely benefits society and citizens through European territorial cooperation (Interreg).

## ***(5) Conclusions***

1. The European Foundation for Education was partner in a number of EU projects for achieving better professional perspectives for young people.

The results of all projects showed that we do not lack knowledge, but there is a big difference between knowledge as to what transformations are necessary and the actual changes occurring in reality.

2. We are experiencing new global competitions, particularly those resulting from political interventions and the dependencies on supply chains. In order to

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<sup>4</sup> The text of the Danubian Charter for Young Talents can be found on the EDU-LAB project webpage at [www.interreg-danube.eu/edu-lab](http://www.interreg-danube.eu/edu-lab).

achieve a greater sovereignty of Europe and a CO2-neutral EU, we need to make important efforts in education, science and research.

3. The growth of the digital media and artificial intelligence is a trend that creates the need for new pedagogical and didactic methods of teaching and learning. The European countries are still very dependent on American companies in many branches, including education technologies. ChatGPT is the most recent example.

4. Education is traditionally an important responsibility of all member states. They are facing similar challenges in the course of educational transformation. In supporting the processes it involves, the European Education Area has created instruments for cooperation, has promoted mobility, exchange of knowledge, greater transparency and better quality of higher education.

5. The engagement of the EU in educational matters will be helpful and necessary for stronger cooperation based on the experience and knowledge of different countries as well as of the OECD.

Considering the demographic development and dependencies of Europe, and in view of global competition, we should all have a common goal:

- To provide all children and young people in our European countries with fair and better chances for personal and professional development
- To enable them to act in a responsible manner for a sustainable future.

To achieve this goal, governments, science and research, economic and social partners, and civil society should actively contribute to the innovating of the educational systems and the paths to quality education and training for all. With this common understanding, the vision of EEA for a “Europe of Knowledge”, including education for sustainable development, could become a reality in the future.

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**About the author:** Professor Dr. Wolfgang Schuster is Chairman of the European Foundation for Education in Stuttgart, Germany. He is professor of law and the former Lord Mayor of Stuttgart, Germany, from January 1997 until January 2013.

# Human Capital Investment, the NEETs and Ways out of Labor Force Shortage: A Comparison of Practices in Bulgaria and Austria

Daniela Dimova

**Abstract:** *The topics of this article range from popular economic and sociological definitions of the term “human capital” to enterprises’ perception of human capital and of current challenges arising from demographic trends. The article compares statistics for NEETs in Bulgaria and Austria and examines the young population as a potential human capital source needed to tackle European job market challenges, such as human capital availability or scarcity, skills mismatch, technological progress and resulting changes in the job market. Dual education is proposed as a possible solution for both countries. The article suggests directions for further research on human capital investments and their effect on regions.*

**Keywords:** human capital investment, dual education, NEETs, young labor resources, technological progress, changing job market, skills mismatch.

## I. Introduction

This article discusses the issue of labor force shortage in Europe, focusing on data from Bulgaria and Austria in order to compare young human capital (HC) availability and its usage. The two countries are similar in territory and population size, and in the industrial specializations of their economies. The analysis focuses on NEETs<sup>1</sup> in these two countries, investigating the factors that trigger issues related to labor force availability. There is a pressing need to identify the main causes of this problem. An emphasis is put on tendencies common to the two countries: a demographic crisis leading to shortage of labor and skills; technological change; and a changing job market. Not least, possible measures are proposed for investing in the qualification of the young population. The chosen methodology is desk research: information is derived from websites, annual reports, literature, publications by companies, and other public sources.

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<sup>1</sup> According to Eurostat the indicator of “young persons not engaged in employment, education or training”, abbreviated as NEET, corresponds to the percentage of the population in a given age group that is not employed and not involved in further education or training. The numerator of the share refers to persons meeting these two conditions: 1) they are not employed (i.e., they are unemployed or inactive according to the definition used by the International Labor Organization); 2) they have not received any formal or non-formal education or training in the four weeks preceding the survey. The denominator is the total population of the same age group, excluding the respondents who have not answered the question as to their “participation in regular (formal) education and training”.

## II. Human Capital. Why are investments in it necessary?

### *2.1 Definitions of human capital*

The term human capital (HC) has been defined by many social scientists and economists. Already in the 1960s, economists and social scientists from the Chicago School concentrated on building HC theory. One of the prominent members of the school, Theodore Schultz, wrote in 1982 that HC is formed by investing in the innate and acquired skills : “Take into account the innate and acquired skills. These are important and may invest to expand, will form the HC” (Schultz & Schultz, 1982). In a book published in 1964, Gary Becker developed a theoretical basis for decisions on HC investment (Becker, 2009). Beyond the definition of HC, Bourdieu developed the concept of cultural capital in his book *Cultural Reproduction and Social Reproduction* (1977), co-authored by Jean-Claude Passeron. The concept refers to social and cultural capital that can further “promote social mobility within a stratified society”. In 1987 Bourdieu further specified the term cultural capital, distinguishing between educational attainment, possession of cultural goods and people’s values, skills, knowledge and tastes. An important aspect of HC is knowledge and skills, as later discussed by Armstrong (2006). Knowledge and skills are created, maintained and used by individuals in performance of tasks. Some newer theories enlarge on this understanding and define HC as a total set of the individual’s congenital and acquired skills, knowledge and experience. Another definition of HC, proposed by OECD, is HR as a collective term for knowledge, skills, abilities and other characteristics important for economic growth. Bourdieu indicates that HC represents “any capability that enables producing profit and that reproduces itself in the same or extended form” (Mazouch & Fischer, 2011).

### *2.2 Human Capital as one of the main production factors: an enterprises perspective*

After introducing some key theories of HC and defining the term, it is necessary to consider HC from the perspective of enterprises, which see it as one of the main factors of economic production. The definition of HC may differ in microeconomic vs. macroeconomic approaches. In the microeconomic perspective, there are two basic approaches. The *business approach* sees HC as one production factor among others, such as material, property and human labor factors. Here, HC is considered only as a qualitative aspect of human labor. The *managerial* view, by contrast, considers HC as a business resource or asset forming the market value of a given company. HC is seen as an intangible company asset, as part of the company’s intellectual property, which plays an influential role for the company’s market value. The management approach to HC involves the term “knowledge capital”. Peter Drucker (2006), who first introduced the concept, theorized that the world was passing from a production-based

to a knowledge-based economy, in which HC would be a company's most valuable capital in that it offered knowledge capital. On the other hand, in the macroeconomic approach, HC plays a significant role as a source of economic growth, being one of the main production factors (Kucharčíková, 2011). From a sociological perspective, investment in HC can be seen as a process of acquiring knowledge, skills, and abilities that contribute to an individual's productivity and earning potential. This process can have many forms, including formal education and training, informal learning experiences, and on-the-job training. Investment in HC is essentially a social process that involves a variety of actors and institutions, including individuals, families, schools, employers, and governments. Unlike economists, sociologists have long been interested in the social and cultural factors that shape the development and distribution of HC, as well as the ways in which investments in HC contribute to social inequality and stratification. One important concept in the sociological study of HC is social reproduction, which refers to the ways in which social and cultural factors reproduce and reinforce existing patterns of social inequality and stratification. For example, individuals with more privileged backgrounds may have greater access to high-quality education and training opportunities, which can help them to acquire more HC and achieve greater economic success. Conversely, individuals with disadvantaged family backgrounds may have fewer opportunities to invest in their HC, which can limit their earning potential and contribute to economic inequality.

For the purpose of the present analysis, we use an interdisciplinary approach, which combines the best achievements of the microeconomic perspective and sociological theories ranging from classical sociological concepts such as those of Pierre Bourdieu, of Randall Collins (*Credential society: An historical sociology of education and stratification*, 1979), James Coleman (his discussion of the relationship between education and social inequality presented in his work *Equality of Educational Opportunity*, 1966) to representatives of the new economic sociology such as David Stark, Brian Uzzi, and Paul DiMaggio. Enterprises invest in HC through education and training in order to develop the knowledge and skills that their workers need to perform the duties and tasks set by the company. Expenditures are made on education in order to enhance, sustain and develop skills and knowledge that contribute indirectly, through human labor, to future output size. Thus, expenditure on education is defined as an investment. Developing the labor force through education and training enables enterprises to respond quickly to technological changes and make the transition to the information society.

Investing in HC is indisputably a necessity and every organization and individual should be familiar with its benefits for preserving quality and competitiveness in the global economy. HC investment is one of the main drivers of economic growth, even though its direct influence is not directly measurable.

The European Training Foundation defines HC development as "the creation of lifelong learning systems that provide opportunities and incentives for people to develop their skills, competences, knowledge and attitudes throughout their lives for the sake of employment and realisation of their potential, and as a contribution to

prosperous, innovative and inclusive societies”. According to Becker’s HC theory, the rate of return from investments decreases as a person’s age increases; hence, individuals tend to invest at the start of their work careers. In the context of the business perspective, it may be concluded that, the earlier HC investments are made, the higher will be the return for the enterprise. One of the possible investment practices is dual education in enterprises. It aims to invest in potential young workers, which directly creates benefits both for companies and for the young labor force, while also impacting in many positive ways on society. It is crucial to develop the available HC, since high-skilled and trained workers are the driving force for increasing the cultural and living standard of a society (the so-called external economies). Such investments are particularly needed in economies like the Bulgarian one, which is at the bottom of many European scales. Even though the direct contribution of HC to economic growth is not easy to measure, some OECD statistics indicate that the average prolongation of study by one year contributes to a 4 to 6 per cent long-term growth of GDP (OECD, 2011).

### **III. Human capital availability of young workers in Bulgaria vs. Austria**

As already mentioned in the previous chapters, HC investment is crucial and clearly necessary for everyone in modern societies. In the Eastern European countries, and particularly in Bulgaria, HC is an important driver of socio-economic development. Hence, it is essential to make the best use of the available HC in order to achieve sustainable and inclusive development and growth. Even though the situations in countries across Europe vary, many issues and developments are similar in these countries. In this chapter, we focus on and discuss the main employment and labor-market indicators in Bulgaria and Austria, as well as the most important HC challenges the two countries face. The focus is on the young population of both countries, as well as the challenges that directly affect the professional development of young people.

For the purpose of this research three common tendencies will be further indicated, explained and compared: the use of young labor resources, the changing job market, and the skills mismatch, i.e., education and skills that no longer fit their purpose.

#### *3.1 Effective use of young labor resources*

One of the biggest challenges facing Bulgaria at present and that may continue in the coming decades is related to demographic trends. The deepening demographic crisis and the related unfavorable quantitative changes in demographic parameters have grown in the last three decades, reaching a threshold that implies permanent destabilization of the natural reproduction regime. The population of Bulgaria has been decreasing during this period as a result of a demographic transformation that began in the 1990s. Low birth rates in the beginning of 21<sup>st</sup> century, combined with

one of the highest mortality rates in the world and record emigration rates among the young population, have resulted in a shrinking of the Bulgarian population by 16 per cent in a time span of only 30 years (Bardarov & Ilieva, 2018).

As mentioned in the previous chapters, HC is related to skills, competences, knowledge and attitudes. There is a clear relationship between HC investment and NEETs. Young people who are not engaged in education, training, or work are missing opportunities to develop and invest in their HC. In failing to acquire new skills and knowledge or gain work experience today, they may find it harder to enter the job market and achieve economic independence in the future. The lack of investment in HC might have long-term consequences for their economic and social well-being, as well as for society as a whole. Addressing the issue of NEETs and promoting investment in HC among young people is therefore an important goal for policymakers, educators, and employers/companies. This may involve providing access to education and training programs, creating opportunities for work experience and apprenticeships, and addressing the underlying social and economic factors that contribute to youth unemployment and disengagement.

For the purpose of further research, this article uses the Eurostat's definition of NEETS: "The share of young people neither in employment nor in education and training is an indicator that measures the proportion of a given subpopulation who are not employed and not involved in any further education or training; these people may be subdivided into those who are unemployed and those who are considered outside the labor force (in other words, they do not have a job and they are not actively seeking employment)". The European Union has set an EU-level target for the age group 15-29, requiring that the share of young people neither in employment nor in education or training should be less than 9 per cent by 2030. In 2021, an average 13.1 per cent of the population of EU countries were identified as NEETs. This category is among the most vulnerable groups in times of financial and economic crises. The common assumption is that NEETs are at much greater risk of remaining unemployed, experiencing poverty, and being socially excluded in the future.

So how is Bulgaria using its young HC (persons aged 15-29 years)? Between 2011 and 2021, the share of NEETs in Bulgaria decreased by 7.1 per cent (from 24.7 to 17.6 per cent). Nevertheless, in this respect, Bulgaria remains third in the ranking of European countries, after Italy (23.1 per cent) and Romania (20.3 per cent). For the purpose of further research, the level of NEETs by educational attainment level is also to be considered. It is usually common to have high NEET rates among people with a low level of education and low NEET rates among people with a high level of education. This is true for Bulgaria as well, where the NEET rate for people aged 15-29 with a low level of education (pre-primary, primary and lower secondary education) was 24.4 per cent in 2021; for young people aged 15-29 with a medium level of education it was 14.5 per cent; and for those with tertiary education, it was only 11.1 per cent. Young women are more likely to neither be in employment nor in education or training than young men – the average share of NEETs among men in Bulgaria in this age group was 14.5 per cent, over 5 percentage points lower than



the female rate. An analysis of the three different age groups of young people (aged 15–19, 20–24 and 25–29) shows that the gender gap among NEETs had increased in relation to age in 2021: the rate was consistently higher among women than among men. Apparently, the NEET rates differ depending on the degree of urbanization of the place of residence. In this respect, Bulgaria presents the largest difference of percentages between cities and rural areas: 11.1 per cent for young adults living in cities and 29.3 per cent for youths in rural areas (Eurostat, 2022).

We shall further consider the data on NEETs in Austria. During the period 2011–2022 there was a slight increase in NEETs in Austria – from 8.5 per cent in 2011 to 9.4 per cent registered in the latest available report, 2022. This country almost attains the EU goal for 2030. The data for Austria correspond to the general European trend related to the educational attainment of NEETs: the highest NEETs rates are registered among young adults with a low level of education (12.9 per cent), whereas only 5.9 per cent of NEETs possess a completed tertiary degree. For all age groups under study, women in Austria are likewise more likely than men to fall into the NEET category. In contrast with most countries surveyed by Eurostat, the share of NEETs in Austrian cities is higher than in rural areas (11 per cent compared to only 7.4 per cent) (Eurostat, 2022).

Concluding from the data on NEETs in Bulgaria and Austria, we may say that young HC in Bulgaria is underutilized in comparison with other EU countries. Youths find it particularly difficult to obtain suitable employment and are more likely to end up as NEETs. This entails the lower probability that they will return to the education system and improve their skills, which in turn worsens their future labor market prospects.

### *3.2 The changing job market and requirements for the labor force*

European countries are currently facing tough challenges triggered by globalization and technological changes such as digitalization and labor-substituting automation. In the context of digitalization and economic competitiveness, the Bulgarian economy is particularly marked by inconsistency in the growth and development of key industries. In recent years the role of the emerging ICT sector, triggered by the global digitalization trend, has steadily grown in Bulgaria's economy, and we may observe a large concentration of investments and human resource mobilization in the capital city and surrounding region (Jeleva, 2022). However, this sector predominantly relies on outsourcing its services abroad, which does not provide job stability: jobs may be easily transferred to other cost-effective locations (Kirov, 2022). On the other hand, the manufacturing sector here is more evenly spread throughout the country, mostly due to Bulgaria's past industrial traditions and specialization in manufacturing. The world industrial trends, more specifically the transition to Industry 4.0, are slowly making their way into the Bulgarian industry. Even though the ICT sector is fairly well developed, integration between ICT and manufacturing is barely noticeable. The country is lagging in this respect compared

with the rest of Europe. A further trend worth considering is connected with the recent worldwide COVID-19 crisis. Disrupted supply chains from China and Asia led many European economic giants to considering relocation of their facilities back to Europe, especially to the eastern European countries. This trend might create opportunities for the Bulgarian economy to increase its share of high value-added production. The local economy should be prepared to respond to the requirements of the new industrial era in order to become a competitive investment destination. Human resources are a key element underpinning this industrial transition. Thus, a skilled labor force is essential for developing high value-added economic branches. The job market is changing as a result of digitalization and technological progress, which are seen as the main driver for digital skills development and changes in industry (European Commission, 2020).

### *3.3 The systems of education and skills development no longer fit their purpose*

Skills mismatch is a generic term referring to various types of imbalance between the skills and competences offered and those required by the labor market. This phenomenon can be observed in various aspects. For instance, there may be overeducation combined with underoccupation of the available labor force (Sala, 2011). Skills mismatch and shortage of skills is currently seen as a trend in contemporary European societies that is likely to increase. Suitable, education, fit for its purpose, at secondary, post-secondary and higher education levels, may be a powerful solution to this mismatch. Workers or job seekers often lack technical competences and problem-solving skills. Creative and critical thinking skills are also barely trained in schools, regardless of the type of educational institutions. In a recent survey (2019) conducted with Bulgarian educational institutions, businesspersons and local government, more than 60 per cent of the respondents agreed that the level of professional qualification of persons with completed higher education only partially corresponded to the requirements for specific professional skills. Another one third of the respondents pointed out that the professional qualification of graduates did not at all match the required professional skills (Jeleva & Nakova-Manolova, 2019). Some causes of skills shortage and mismatch were indicated. The main problems were seen to be the lack of internships and practical training during education, and that businesses were not involved in designing the study programs and the selection of courses for graduates. Moreover, higher education tends to focus too much on the accumulation of knowledge and does not seem to provide opportunities to develop non-cognitive skills through the application of knowledge, skills and competences. The quality of the available labor force is also seen as a problem for businesses and their growth. The Bulgarian Industrial Association (BIA) published data from a 2022 survey of 796 members of the Association. For more than 70 per cent of the surveyed businesspersons, the shortage of young labor force and the quality of education were a huge concern. Thus, economic growth is at risk, inasmuch as the availability and quality of the labor force is one of the main drivers of growth (BIA, 2022).

A possible way of resolving these problems is to introduce initial vocational training (IVET) in enterprises; the term is defined as preparation of people with skills and/or competences for a specific occupation/sector (Hogarth, Hoyos, Gambin, Wilson, & Brown, 2009). Today, IVET is no longer considered only a vocational pathway, but is also seen as an alternative pathway to the academic route. It may contain many elements of an academic education, which can ultimately lead to a tertiary level education. A survey (Eurostat, 2023) conducted in 2020 showed that less than 10 per cent of enterprises provided IVET in Bulgaria. This indicates the insufficient involvement of Bulgarian enterprises in the training and education of the labor force, despite awareness of the graduates' poor quality of education and skills.

Labor market trends in other European countries, including Austria, do not differ much from those in Bulgaria. In a recent survey of more than 4,000 member companies of the Austrian Chamber of Commerce, 87 per cent of respondents admitted experiencing labor force shortage. The lack of skilled workers was felt most strongly in tourism (81 per cent), in construction (81 per cent) and in the manufacture of wooden articles (76 per cent) as well as in crafts and technology in general and in transportation. With regard to educational qualifications, the most frequent and greatest recruitment difficulties were related to finding graduates with apprenticeships: the absolute number and relative share of employed persons with an apprenticeship qualification has been falling for years. 59 per cent of the companies who experience a shortage of skilled workers often have difficulties in finding employees with apprenticeship degrees (in comparison with only 13 per cent who have problems finding workers with technical college degrees; and 8 per cent, with university degrees). The demographic crisis in the country could be blamed for this shortage of labor and skills. However, the problem is not due to lack of willingness to provide training on the part of Austrian companies. On the contrary, approximately half of the companies would train more apprentices if they could find sufficiently suitable and interested young people. Moreover, the prediction of the surveyed companies regarding the shortage of skilled workers in the next three years are more pessimistic here than in any previous survey. The companies consider that a possible response to the problem could be to increase employment incentives for the unemployed and to promote apprenticeships for people aged over 18 years, as well as incentives for increasing the labor force participation of women (Dornmayr & Riepl, 2022).

#### **IV. The response of enterprises to HC challenges**

Enterprises play a crucial role for the response to challenges in HC labor market availability. As already mentioned above, investing in HC through education is necessary and profitable not only for employed individuals but also for the enterprises, especially in view of current labor force shortages. Employers may rely on many possible practices of investment in the skills and knowledge of employees

and the training of suitable workers. A common and already proven practice in German-speaking European countries is dual education through cooperation between mid-level schools and enterprises. As Becker suggests, earlier investments in the professional career give greater economic return. Dual education is indisputably a triple-win situation. Firstly, companies train their future employees at the highest standards. Secondly, young people receive a solid education and can find work in their country or their home region. Not least, there is a benefit for the whole country or region: a well-educated young population creates socio-economic added value (Jeleva, 2021).

Austria is one of the countries with the longest traditions in dual education. The extensive co-operation between the business organizations and higher vocational schools is one of the distinctive features of the Austrian educational system. The combination of theoretical and practical training prepares students for careers in various sectors. The so called “Lehre” or “Duale Ausbildung” (meaning “dual education or cooperative education”) is considered to be a direct investment in the HC of young people by the company. This two-pronged approach is praised and being adopted throughout Europe and beyond. Recently, the US Labor Secretary Marty Walsh visited Austria to discuss with his counterparts the possibility for strengthening partnership in the field of dual apprenticeship training (Austria Presse Agentur, 2023). The statistics speak for themselves: in 2022 there were more than 108,000 vocational students in Austria, which was approximately 20 per cent of the total population in the age group 15-20 years (WKO, 2022). The most popular choice for students was crafts and industry – almost half of the students were training in this area, while the second most popular occupations were trade and tourism, chosen by around 20 per cent of all students (WKO, 2022).

Many countries, including Bulgaria, are trying to introduce the model of dual education in the vocational educational institutions, in response to the issues discussed in the previous chapter, and considering that NEETs are a possible source of labor force for the country. This prospect is moreover driven by foreign investments in Bulgaria, especially those coming from German-speaking countries such as Austria. Foreign investors highly value the specialized skills and the fundamental know-how that students acquire through dual education, a practice known to investors from their home countries. One of the good examples is the local project started in Bulgaria in 2014 and funded by the Austrian Chamber of Commerce in cooperation with the Austrian Federal Ministry of Labor and Economics. At first it was conceived as a means of facilitating Austrian investors in Bulgaria in search of qualified workers in local communities. The project supports and promotes cooperation between the investors and vocational high schools in the respective regions, creating tailored educational programs in key professions. As of 2023, the project has already spread to more than 30 partner schools throughout Bulgaria and to more than 1,100 graduates of the dual education program (GODUAL, 2023). Nevertheless, the results in Bulgaria are nowhere near as successful as in Austria: many hurdles face enterprises and schools willing to introduce these programs. An enterprise cannot start a dual education

program without an educational partner from the area. The public sector often shows small interest in cooperation with businesses. Even when partners are willing to start cooperation, the dual education and the professions offered are not interesting or popular with school children and their parents. The training offered is usually for professions in applied fields, such as mechanics, welders, electricians, logisticians, etc. Moreover, the Bulgarian education system is mostly of an academic kind, relatively conservative and not easily adaptable to changes in labor market demands. In the context of skills mismatch, some authors point out that the Bulgarian educational system is weakly connected with the labor market and its requirements (Imdorf, Ilieva-Trichkova, Stoilova, Boyadjieva, & Gerganov, 2022). As a result of technological change, digitalization and the altered job market, the pre-defined vocational education training (VET) professions in Bulgaria no longer correspond to contemporary job requirements and do not match the market demands (Stefanova, 2014; Apostolov & Milenkova, 2018). The relatively high unemployment rates of NEETs, discussed in the previous chapters, can be partly explained by outdated VET programs. Although VET seems to provide a solution to the problem of unemployment amongst NEETs and of insufficient usage of the available workforce, there might be some limitations to its effect in Bulgaria, where there are pronounced regional disparities. Recent research on school-to-work transition (STWT) in Bulgaria provided some evidence of regional and ethnical disparities across the country and their influence on the labor market entry of youths (Imdorf, Ilieva-Trichkova, Stoilova, Boyadjieva, & Gerganov, 2022: 16). While post-secondary and tertiary education prevents ethnic Bulgarians and Turks from ending up unemployed after leaving school, the study showed that the Roma very rarely attain tertiary education, and that vocational education does not influence their further professional life. Significant ethnic disparities are still visible, even if the educational attainment is not considered as a variable (ibid.). According to the study, the risks of transition to the labor market may differ across regions, taking into consideration the regional factors. The results showed that there is a positive correlation between the level of urbanization and the strength of the local economy on one hand, and the smoothness of school-to-work transitions on the other (Imdorf, Ilieva-Trichkova, Stoilova, Boyadjieva, & Gerganov, 2022).

## **V. Conclusion**

Consistent investments in HC undoubtedly bring social and economic benefits. As Becker (2019) suggests, a successful strategy is investment in education in the earliest development stages possible, whereby the effect and benefit for all parties are maximized. In order for the industrial transformation to succeed in times of change, education and skills need to be steadily improved. The demographic crisis in Europe, and particularly in Bulgaria, is already leading to shortage of labor and skills. When its effect is combined with technological change and changes on the job market, many challenges certainly arise for the economy and its growth potential in the near future.

It is important to find solutions that go beyond the level of the particular strategy of a single company (often these are large companies, with foreign participation, large financial resources and serious technological advances in their industrial production). It is also important to consider what value can be added by investment in HC across the region and in smaller and micro enterprises. The comparative analysis of the Bulgarian and Austrian case suggests that further empirical research on the topic would tell us more about the connection between the HC challenges and the importance of HC for individual regions across the country.

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**About the author:** Daniela Dimova has been a PhD student at the Bulgarian Academy of Sciences since 2022. She has a Bachelor's degree from Freie Universität Berlin and a Master's degree from the Technical University, Sofia. Her research interests range from human capital investment and regional development to educational and professional choices of young people. Currently she is part of the Foreign Trade Promotion Organization of the Austrian Economy in Bulgaria, where her main responsibilities are to promote industrial cooperation and investment relations between Austria and Bulgaria in the field of education, ICT and environmental technologies.



# Digital Skills: A Necessity or a Possibility for the Professional Realization of Youths in Bulgaria

Kamelia Petkova

**Abstract:** *In today's globalized world, the future of Europe is inconceivable without digitalization and innovation. The expansion of digital technologies in daily life and work is growing at an accelerated pace. This fact makes it necessary for businesses to adapt to digital technologies and innovations, but also that young people seeking successful labor market realization should possess the digital skills that will give them the freedom to act. Based on the results of qualitative research, we will attempt to answer the question as to how the business sphere is responding to the new challenges arising from the fast entry of digital technologies in the economy and in professions, and what are the opportunities and risks faced by youths on the dynamically changing labor market. Based on the results of in-depth interviews<sup>1</sup> conducted with members of various ethnic communities, we will trace the benefits derived from Internet use and the possession of certain digital skills needed for more successful realization of youths on the Bulgarian, but also more generally the European, labor market.*

**Keywords:** youths, contemporary Europe, digital skills, innovations

In today's globalized world, Europe's future would be inconceivable without digitalization and innovation. The COVID-19 pandemic radically changed the importance of digital technologies for European society and the European economy. Against the backdrop of a variety of challenges facing Europe, in March 2021 the European Commission published a communication to the European Parliament and the Committee of the Regions, in which it presented its view on the goals and paths for the successful digital transformation of Europe until the year 2030; the Commission formulated a set of principles for encouraging and upholding EU values in digital space. A number of EU documents have clearly emphasized the importance of digital skills for the introduction of new technologies into the economy and many social spheres. A priority issue on the agenda of Bulgaria, as a member state of the EU, is the question of digitalization and the population's digital skills that may enable a more successful professional realization of young people in Bulgaria and, more generally, in Europe. The EC report "eGovernment Benchmark 2021" pointed out that our country had achieved a medium degree of digitalization in 2021, grown by 5

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<sup>1</sup> The in-depth interviews were conducted in the framework of the project "Digital Divide and Social Inequalities: Levels, Actors and Interplay", funded by the National Science Fund, Ministry of Education and Science.



**Figure 1. Digital Economy and Society Index of EU member states in 2022.**

*Source: Digital Economy and Society Index. Bulgaria, 2022: 3*

percentage points to 59% in one year; by comparison, the EU average was 72%. By this indicator, Bulgaria was in 27<sup>th</sup> position among 36 countries.

Eurostat figures and the Digital Economy and Society Index (DESI) for 2022 indicate some disturbing trends. The data show that the shares of Bulgarians who have at least basic digital skills or above basic, are lower than the EU average; in the “above basic” category, the difference is considerable (8% compared with the EU average of 26%) (DESI 2022. Bulgaria: 4).

When considering to what extent these skills are necessary for the labor market realization of youths in Bulgaria and Europe, we should specify the meaning we attach to the concept. For the purposes of the present report, we have adopted Paul Gilster’s definition of digital literacy, which considers it at two levels:

- The ability to access networked computer resources and use them in order to find, organize, process, assess and communicate information properly (Gilster, 1997);
- The ability to follow and apply specific safety rules, as well as norms related to the ethical and legal use of information (Ibid: 12).

Based on this definition, we can deduce the importance of digital technologies and skills from the perspective of their capacity to enable the realization of young people in various social spheres, including the labor market. In the context of social isolation caused by anti-pandemic measures, population aging and structural unemployment, Bulgarian employers are facing a number of challenges. On the one hand, they must invest in digital technologies, but on the other, the serious deficit and misbalance in the workforce’s skills are seriously restricting the potential for economic growth and

development. Such conclusions have been empirically verified by a quantitative social survey on Bulgarian employers, conducted in 2023 in the framework of the project “Digital Democracy in Action” and financed under Operational Programme “Good Governance” 2014-2020. The data indicate that the pandemic compelled Bulgarian employers to rethink their priorities. A little more than half of the representatives of business (54.3%) were of the opinion that, under COVID-19 conditions, the need for requalification and training of employees for work with the new technologies had grown at a considerable pace. Gaps in the knowledge and skills of the staff are becoming increasingly evident and are causing considerable difficulties in the work process (Analytical Report under the project “Digital Democracy in Action”, 2023:24).

**Table 1. Employers’ priorities in the sphere of digitalization as a consequence of the COVID-10 pandemic ( %)**

	Assessment by businesspersons (%)
Introduction of new technologies for distance communication and online meetings with employees	16,8
Development of new digital services	22,4
Requalification and training of newly hired employees for the acquirement of digital skills	54,3
Increased automatization of work	36,4
Perfecting the organization of work in accordance with the use of modern digital technologies	44,9
Increased investments in digitalization	17,9
No change of priorities	14,0

*Source: Analytical Report under the project “Digital Democracy in Action”, 2023:24.*

The lack of adequate digital skills is precisely what may lead to the exclusion of certain strata of the population from the labor market, as was found to be the case for a large share of the young people of Roma and Turkish origin with whom we conducted in-depth interviews. According to Ragnedda, the lack of adequate digital skills is a basic cause of the second type of digital divide. The results of a national survey, conducted in 2019 for the Bulgarian Chamber of Commerce and Industry under the project “Digital Small and Medium Enterprises: Stimulating the Contribution of SMEs for the Implementation of Policies for Digitalizing the Economy” (funded under Operational Programme “Good Governance”), have confirmed the above conclusion. According to 550 surveyed businesspersons, digitalization is an inevitable trend that, on the one hand, is significantly changing the contemporary labor market and, on the other hand, is setting new requirements for workers and employees (including the newly hired ones). According to this study, digitalization will lead, in first place, to the

**Table 2. The impact of digitalization on the labor market (%)**

	Relative share of respondents
Digitalization will lead to a reduction of jobs	32%
New professions will appear	58%
Workers will have to train constantly	58%
The employer-worker relationship will change radically	18%
A new “robot” tax will be introduced	3%
I don’t expect any great changes	7%

*Source: Analytical report for the project DIGITAL SMEs: Stimulating the contribution of SMEs to the implementation of policies for digitalizing the economy, 2019:4)*

emergence of new professions (according to 58% of the respondents), will stimulate the need for continuous training of employees (58% of the respondents), will lead to reduction of jobs due to the implementation of robots (32% of respondents) and will change the relations between employers and workers (18%) (Analytical report for the project DIGITAL SMEs: Stimulating the contribution of SMEs to the implementation of policies for digitalizing the economy, 2019:4).

A serious problem is becoming evident: a large share of Bulgarian employers are having difficulties in finding employees who possess digital skills, but at the same time are not investing in the qualification of their staff. A similar conclusion was reached by a special Eurostat survey, which found that, in 2020, the share of enterprises in our country that were providing training in information and communication technologies was only 7%, while the EU average was 20% ([https://ec.europa.eu/info/departments/eurostat-european-statistics\\_bg](https://ec.europa.eu/info/departments/eurostat-european-statistics_bg)). Identical results were registered in a study conducted for the Bulgarian Chamber of Commerce and Industry. According to this survey, 60% of the surveyed employers estimated the level of digitalization in their company as high. However, a large share (38%) pointed out they had difficulties in finding staff possessing the necessary digital skills. They pointed out that a possible strategy for overcoming this problem was to include the staff in digital competency training in order for employees to acquire the needed digital skills and knowledge.

**Table 3. What is the level of digitalization in your company?**

	Share of respondents
Beginning	31%
Advanced	60%
Fully digitalized	9%

*Source: Analytical report for the project DIGITAL SMEs: Stimulating the contribution of SMEs to the implementation of policies for digitalizing the economy, 2019:4)*

**Table 4. Do you easily find staff that meets the digitalization level of your company?**

	Share of respondents
Yes, the employees have good digital skills	15%
Yes, we do find such staff, but the persons must undergo a course of training	39%
No, we find it difficult, because the persons do not meet the requirements of the future trends	38%
We do not need people with digital skills	8%

*Source: Analytical report for the project DIGITAL SMEs: Stimulating the contribution of SMEs to the implementation of policies for digitalizing the economy, 2019:4)*

In studying the role and importance of digital skills for the professional realization of young people on the contemporary labor market, we should have in mind that society is heterogeneous. It can be divided into people who have the technical potential, education, and qualification to practice a certain occupation through digital technologies versus those who, for lack of the means to buy computers and lack of access to the global web, do not have the possibility to acquire the digital competency that would provide them with better prospects for labor market realization. There is an increasingly clear digital divide, which authors like Ragnedda have studies at three levels. According to them, the levels are as follows:

- Access to digital technologies and the possession of technical devices such as Internet access (Ragnedda, 2017:17);
- The possession of certain digital skills that enable better and more active participation on the labor market (Ibid:17);
- The use of digital technologies; in this case, their use for finding better paid and satisfying employment on the labor market (Ibid :17).

These levels of divide are typical both for industrial and developing countries, and for various social-professional groups within a country and within a given social sphere. The results of the in-depth interviews conducted with young Roma and Turks in 2022 in the framework of the project “Digital Divide and Social Inequalities: Levels, Actors and Interplay”, funded by the National Science Fund at the Ministry of Education and Science, have confirmed the above conclusion. The youths with whom we talked agreed unanimously that digital skills were vitally necessary during periods of isolation. These skills are a prerequisite for better labor market realization, especially for those who are motivated to learn by themselves and actively seek openings for well-paying work. In the words of a young woman (in the age group 29-35 years) of Roma ethnicity:

- *“In periods of pandemic, when we are shut off and isolated, I cannot imagine life without Internet. It gives me the freedom to talk with relatives and friends and not to feel lonely. Having digital skills gives you many opportunities. If I were good at the*

*computer, I would try to find some kind of work I could do at home. That way I could look after my children and earn my bread.”*

An essential issue related to the first level of digital divide, is not so much access to the Internet as the availability of the necessary devices, such as a computer, which would enable a person to enhance his/her qualifications, to acquire or improve digital skills. In the course of the qualitative field work with members of the Roma ethnic community, in most cases the respondents identified poverty and low education level as significant hindrances to fully benefiting from the potential of digital technologies. And while the majority of the interviewed young people (10 persons) shared that they had Internet connection on their mobile phones, only two of them had access to computers; something that considerably limited their possibilities for better labor market realization:

- *“I can’t afford to have a computer and Internet at home. I only have mobile Internet on the phone, but I can’t learn to write and send text messages on it. My digital skills are poor, which in my opinion will be a serious obstacle when I decide to look for better-paid work.”*

- *“I don’t have a computer and I can’t work with many of the new programs that I studied some time ago in school. I know they are very useful for me to find a good job that would be legal, under a contract, instead of getting money under the table. I want to learn but, I must tell you, I don’t have the possibility. I do well on the phone, but that is not enough. Nowadays, everywhere, they want you to be able to write on a computer and to calculate various things.”*

All the interviewed youths were aware of the importance of digital skills in the modern world. In answer to the question, *“Do you feel such skills could help you in life and/or work?”*, we received a definitely affirm active answer:

- *“It’s obligatory, in our times this is obligatory, in order to find a job. Everybody around me, the whole family and colleagues, think it is very important these days to possess digital skills. The most suitable way to learn, in my opinion, is for the employer to organize some courses, because he can best judge what kind of training the worker needs in order to cope better with the work.”*

- *“My parents are poor and uneducated people. They have no digital skills. Regardless of them, I and my sister managed to get a good education and to get out of the ghetto. Digital skills are the key to success. They are, in my personal opinion. Thanks to everything I know and can do, I succeeded in finding a very good job and succeeded in becoming independent and even to set aside some money for my parents.”*

- *“I can’t imagine life without digital technologies. I am 19 years old and I have my whole life ahead of me. I want to realize myself successfully and that is why I am doing everything possible to learn new things and educate myself by acquiring knowledge about working with the new programs. I find it interesting, and besides, life without technologies is unthinkable.”*

The latest Eurobarometer survey data, for 2021, on the topic “Digital Rights and Principles” also confirmed people’s growing awareness of the importance of

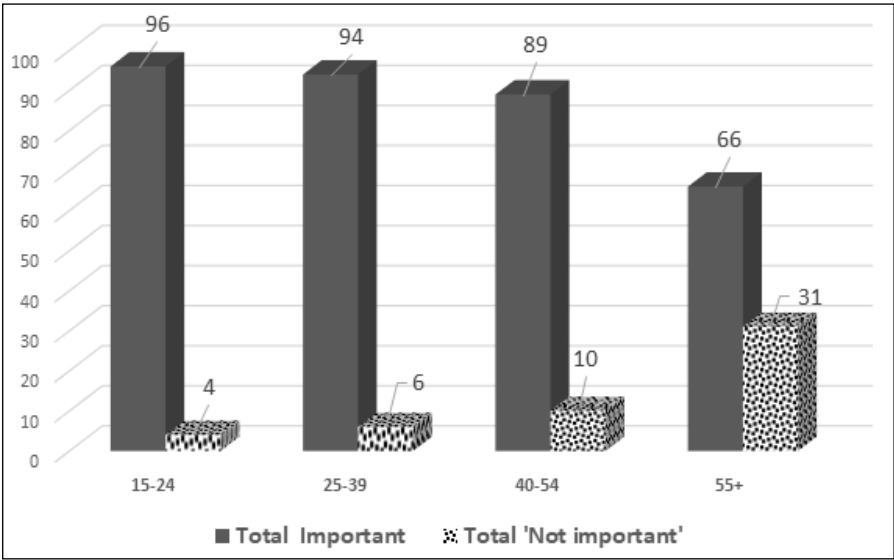
**Table 5. Importance of digital skills and the Internet in 2030 for Europeans**

Degree of importance	Bulgaria	EU
Very important	41%	45%
Important	33%	36%
Not very important	9%	30%
Not important at all	10%	7%
Don't know	2%	2%

Source: *Eurobarometer 518, 2021:11*

digital skills for Europeans even in the near future. According to the survey, 81% of respondents believe these skills will be increasingly necessary on the labor market in 2030. The share of Bulgarians who supported this opinion was also high, 74%. The highest percentages of opinions that these skills are important were registered in Finland (95%), the Netherlands (95%), and Sweden (94%) and the lowest in Rumania (61%), Austria (72%) and Bulgaria (74%). (Eurobarometer 518, 2021:11)

The data indicate that belief in the importance of digital skills and Internet use decreases with the increase of age. These skills are most important for people in the age group 15-24 years (96%) and 25-39 (94%). For them, being able to work with digital technologies is a priority as regards realization in various social spheres. Respectively, as the age groups get higher, the need for such skills decreases. For instance, among people above the age of 55, only 66% of respondents indicated that digitalization was necessary in their daily lives.



**Figure 2. Importance of digital skills and the Internet in 2030 for Europeans by age groups (%)**

Source: *Eurobarometer 518, 2021:11*

**Table 6. Degree of importance of digital skills and Internet access in the lives of Europeans in 2030 by social-professional groups**

Degree of importance	Very important	Not very important
Self-employed	91%	8%
Managers	94%	6%
Other white-collar workers	93%	6%
Workers occupied in physical labor	86%	13%
Unemployed	85%	14%
Pensioners	59%	37%
Students	87%	3%

*Source: Eurobarometer 518, 2021:11*

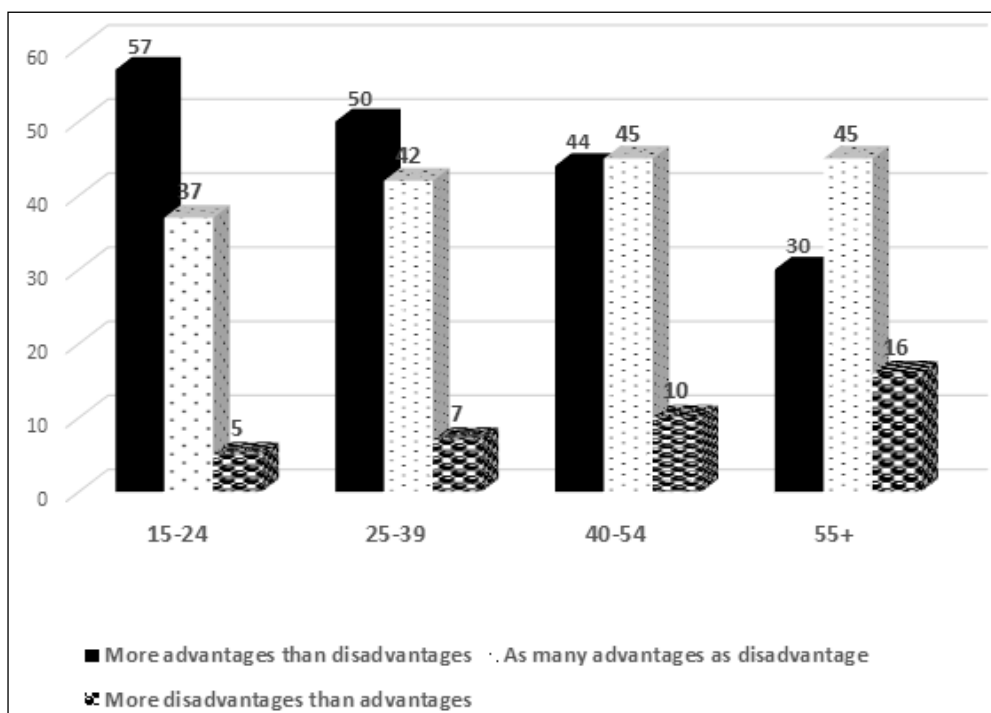
Interesting results were obtained from data analysis by social-professional groups. In general, all surveyed Europeans categorically supported the view that digital skills are very important for the future and the development of European society. Persons holding higher positions in companies showed the highest awareness of this importance: 94% of managers, 93% of white-collar workers, and 91% of the self-employed. The importance of digital skills was least indicated by retired persons (59%), which is certainly due to the fact that they have concluded their professional lives and are facing new kinds of challenges (Eurobarometer 518, 2021:11).

### **Impact of digital skills on the future**

The results of Eurobarometer’s comparative international survey indicate that, according to nearly half the surveyed citizens of the EU, digital skills and Internet use will bring more advantages than disadvantages in 2030. The results for separate countries reveal some interesting patterns. In ten countries, including Finland (67%), Denmark (63%) and Sweden (62%), more than half the surveyed persons expected these skills and facilities would bring greater advantages than disadvantages. The people least likely to support this view were respondents from Rumania (25%), Greece (28%), and France (29%). Significant differences are evident in proportion to age. For instance, young people in the age group 15-24 years (57%) were more inclined to expect digital skills and the Internet would bring them more advantages than disadvantages. With the increase of age, the weight of the advantages decreases at the expense of disadvantages. Among respondents aged 55 or more, only 30% indicated that such skills would be useful for them in their daily lives.

Many researchers, such as Slevin Fitch and Ragnedda, define the third level of the digital divide in terms of who benefits most from online activities. The question arises: *How do young people make use of the new technologies, especially in times of*





**Figure 3. Will the use of digital instruments and the Internet in your life in 2030 bring you more advantages or disadvantages in life? (% - EU)**

Source: Eurobarometer 518, 2021:32

*pandemic, to increase their labor market chances, to find better-paid work, achieve more satisfying employment and career growth in their organization?*

It is evident that some of the young ICT users are able to derive considerably greater benefits for themselves than others – than those who have minimal knowledge and skills in working online. By their nature, digitalization and the information environment in which we live provide many possibilities for self-improvement on the one hand and, on the other, for finding jobs that satisfy the employee in terms of pay and the form of employment. Relevant literature contains more than a few indications that digitalization often damages the interests of specific socio-demographic groups, especially those who have a generally lower social status. For instance, research on participation in MOOCs (Massive Open Online Courses) seems to show that the people who benefit by them are those who already have a high level of education (bachelor's or master's degree) (Ichou, 2018).

The results obtained from the in-depth interviews with respondents from the Roma and Turkish ethnic communities confirm the above conclusions. The data definitely showed that youths possessing a higher social status and educational degree used the Internet to acquire skills that would allow them to exercise better-paying jobs, and even to find customers in the case of those who have businesses of their own

or exercise “capital-enhancing” activities (Zillien & Hargittai, 2009). Here is what a young man of Turkish origin stated; he is 19 years old, has a secondary education, is a hairdresser by profession and runs his own hairdressing salon:

- *“I use the Internet to talk with friends but also for my work. Many people from the neighborhood write to me to make appointments for a haircut, hair dying, hair embellishment. They call me on Viber because it’s free. I organize my work through the Internet. I know at what hour I have an appointment and how many clients I can service during the day. These skills are necessary for me in my daily life. Although they are... how should I say, basic [skills], they provide me my livelihood...”*

Another typical example in this respect is the case of a 30-year-old Roma woman, who has a university education and worked as a copywriter during the COVID pandemic:

- *“During the pandemic I worked as a copywriter for a foreign company. The advantage was that you work from home and at the same time can protect yourself from falling sick from the terrible virus. The work was well paid and I liked it. However, the company shut down its office in Bulgaria and I had to quit”.*

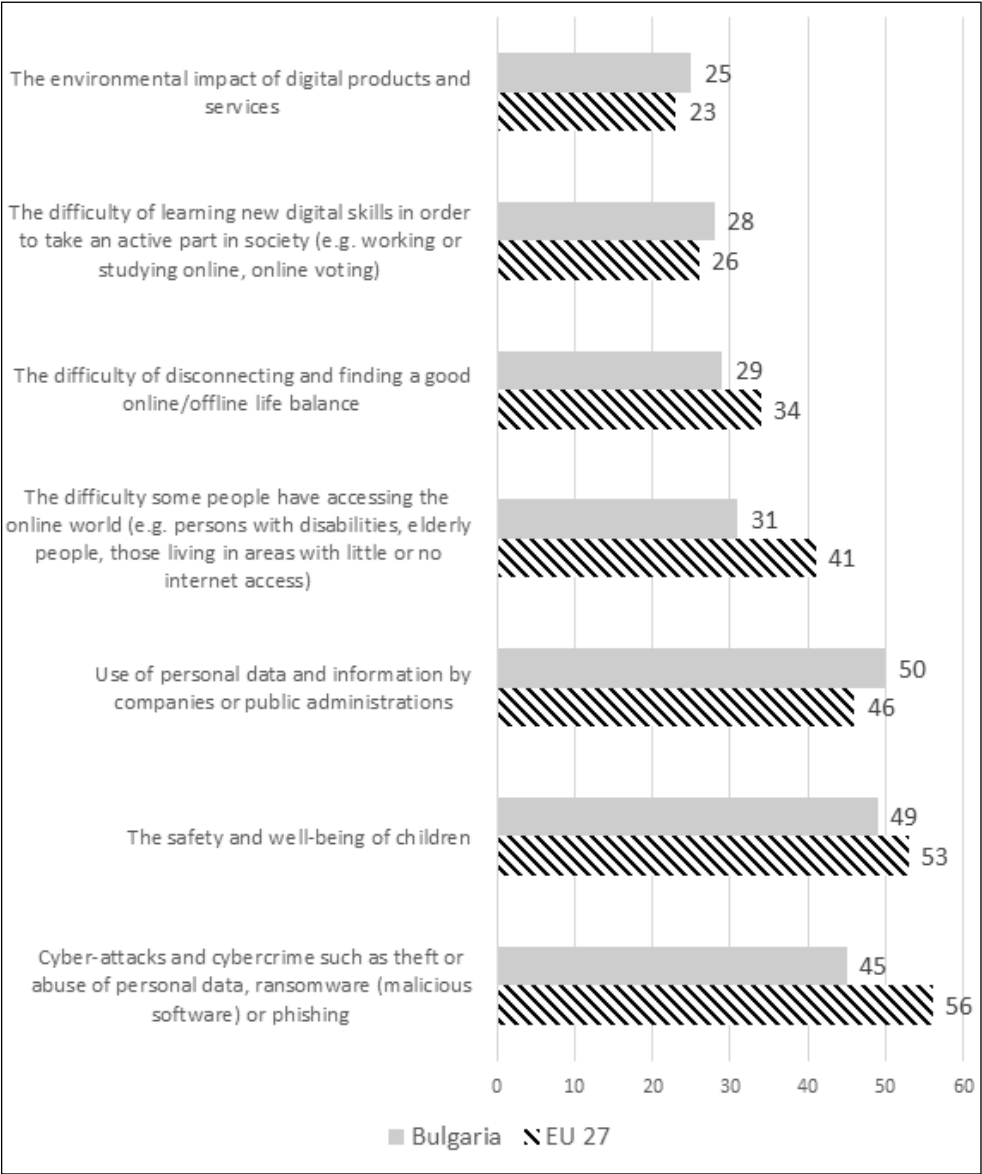
For those with a lower level of education or with no education, the advantages of digitalization are not evident, as in most cases they have no digital skills and their chances of finding well-paying jobs and realizing themselves professionally are considerably smaller. For them, the advantage of digital skills is mostly visible in the possibility of communicating with relatives and friends through the Internet and digital devices:

- *“I use the Internet and digital technologies to talk with my relatives abroad. I don’t know how I could find a decent job because I can’t write on a computer and besides, I don’t have one. My family is poor, we don’t have money to buy a computer, and we don’t have Internet in the neighborhood, and even if we had, I don’t know how to enter and find what I want.”*

The in-depth interviews results indicate that the economic advantages the Internet and digital technologies provide for better labor market realization decrease with age. In most cases, older workers and employees are less motivated to use digitalization for better professional achievement. Labor market realization is not among their priorities. Regardless of age, however, all the persons we talked with emphasized the great importance of digital technologies and skills for a profession and a concrete job:

- *“Very great importance. A few days ago there was a breakdown in the system and things were very difficult. The Internet facilitates us, with just a click, you enter the system. It’s much easier digitally”.*

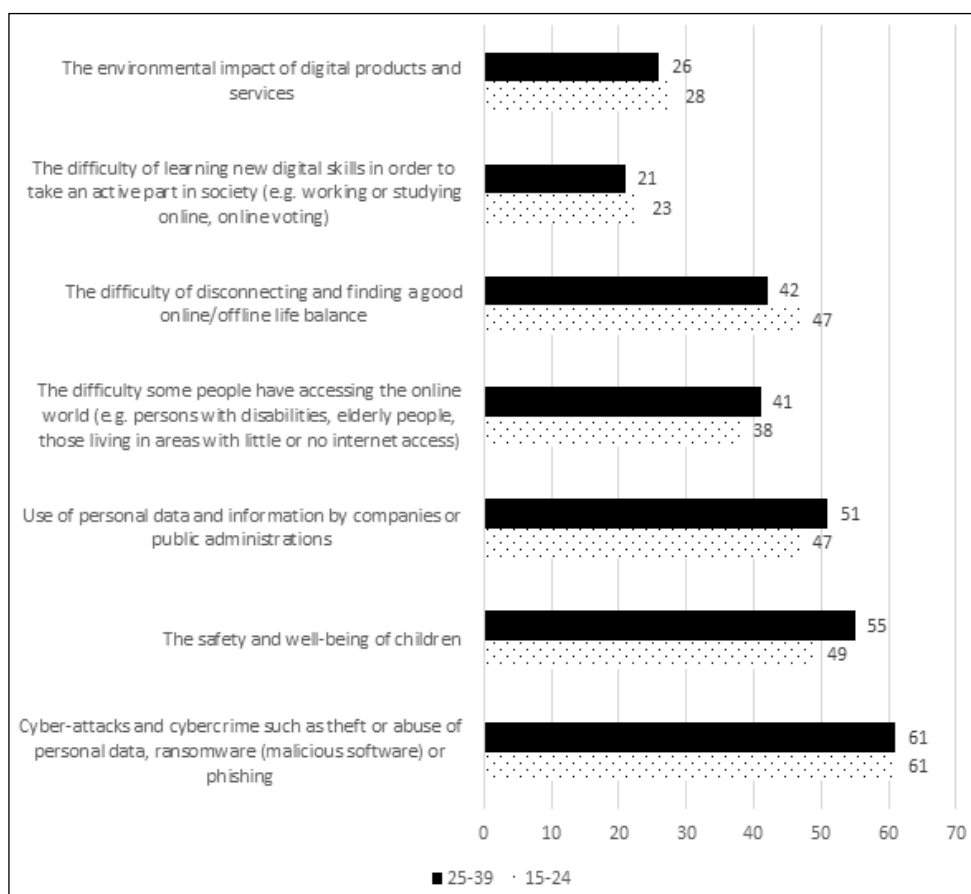
- *“I work in a factory and everything there is through computers. I can’t go on working if I can’t cope with the machine. At first I knew nothing, but they sent me to a training course and I have no problems now. It would be unthinkable without the new technologies. A person, even at a more advanced age, should have some digital skills. There is no other way, even to talk to someone through video chat, you have to know what to do. As for work, in order to have a fairly decent job, you have to be able to work with the machines, and they are all so digitalized that there’s no way you could cope without digital skills.”*



**Figure 4. What worries you most about the increased role of digital tools and the Internet in our society? (%)**

Source: Eurobarometer 518, 2021:11

In addition to the advantages provided by the use of digital technologies in daily life, the Eurobarometer findings also identified certain disadvantages. To the question, *What worries you most about the increased role of digital tools and the Internet in our society?*, Europeans and Bulgarians gave comparatively similar responses. Whereas the largest concern for 50% of Europeans was related to cyber-attacks and



**Figure 5. What worries you most about the increased role of digital tools and the internet in our society by age? (%)**

Source: Eurobarometer 518, 2021:12

cyber-crime, the biggest problem for 50% of Bulgarians was the eventual use of their personal data and information by companies or public administrations. A likewise large share of Europeans (53%) and Bulgarians (49%) indicated “the safety and well-being of children”.

The results show an overlap between the opinions of young people in the age groups 15-29 years and 25-39 years as regards their greatest concern related to the quick entry of digital technologies in daily life. The highest share of concern indicated here was with regard to cyber-attacks, such as theft or abuse of personal data (50%). The respondents also attached great importance to “the safety and well-being of children” and to the risk that personal data might be used by companies and public administrations.

Analyzing the results of the quantitative and qualitative studies, we find that the possession of digital skills by young people creates opportunities but also engenders

inequalities in a society that is stratified anyway (Ragnedda, 2017). For parts of certain social-professional groups, these skills in most cases facilitate the growth of their labor market chances, as regards obtaining better-paying work, more satisfying employment, and career growth in the company. There are quite a few indications that the use of digitalization remains very limited for young people of low social status – specifically, for the members of the Roma ethnic community. And while for many of these people access to Internet is not a problem, in most cases we find they lack or have limited digital skills; this considerably restricts their possibilities for full labor market realization. In most cases, this category of young people faces the dilemma of either settling for low-skilled jobs or remaining entirely outside a labor market in which the role of new technologies is constantly becoming more important. In order to engage these people, especially now, when the shortage of workforce in certain spheres is an increasingly severe issue, measures for encouragement should be undertaken by the government, by the responsible institutions, and also by employers – measures for qualification and training of the staff in the digital skills necessary for work with the new technologies.

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***About the author:*** Kamelia Petkova, PhD is a researcher at the Institute of Philosophy and Sociology at Bulgarian Academy of Sciences (IPS-BAS).

# Digitalization and Ethnic Discrimination through the Eyes of Young People in Bulgaria and South-Eastern Europe

Katerina Katsarska

***Abstract:** The article analyzes discrimination based on ethnicity and gender among young people in Bulgaria, Croatia, Slovenia and Montenegro. A comparative analysis of quantitative data from the European Social Survey 2021 y. relevant to young people aged up to 30 years was conducted, specifically regarding the question as to whether they had been discriminated against. Of the different kinds of discrimination, young people in Bulgaria indicated most often that they had been discriminated against on the basis of their ethnicity. In Montenegro, young people most often indicated discrimination based on ethnicity, gender and religion. Based on data obtained from a focus group discussion conducted with young people (aged up to 30) from the Roma ethnic group in Bulgaria, the author has analyzed strategies for dealing with discrimination among young Roma as well as the role of digitalization for overcoming the risk of discrimination when looking for work and escaping marginalization in society. The multiple inequalities faced by young women of Roma ethnicity are characterized in the light of the concept of intersectionality. In conclusion, the author comments on the obstacles to the greater effectiveness of the European Strategy for Youth Employment and the Strategy for Roma Integration in the Bulgarian context.*

**Keywords:** intersectionality, discrimination, gender, ethnicity.

## Introduction

The problem of ethnic discrimination in labor has been very relevant in the last 25-30 years and attracts the attention of scientific researchers because it is directly related to personal and professional prosperity, the individual's quality of life and the economic development of society in general. In Bulgaria, studies on the topic of ethnic discrimination are mainly associated with discriminatory practices that apply to young people of different ethnicities (Grekova, 2018, Katsarska, 2019). Research shows that the chance of working on an open-ended employment contract decreases for the Roma and Turkish ethnic groups (Katsarska, 2018).

„Ethnic niches“ appear in the labor market. These niches typically include certain professions that are less prestigious, lower paid, and in which people from the Roma ethnic group are represented to a greater extent. Such professions are garbage collection, construction, cleaning homes and offices, driving (Tilkidzhiev, 2011). As a result, we can talk about the „ethnicization“ of certain professions (the Roma are mostly taxi drivers, cleaners, etc.). Very often, the Roma are characterized as „thieves“, „lazy“, „unreliable“ (Tilkidzhiev, 2011). As a result, we witness the reproduction of ethnic inequalities in the sphere of work, pay and the type of employment contracts

under which the Roma work. They often work within the gray economy, without work contracts; in the cases where they have a contract, it is fixed-term or civil.

The analysis in the article aims to provide an insight into the creation of practices of discrimination and exclusion towards the Roma ethnic group and is focused on a comparative study of quantitative data from April 2021, drawn from the European Social Survey of young people up to the age of 30 in Bulgaria, Croatia, Slovenia and Montenegro; the data are related to the question of whether they have been discriminated against. In addition, we have also analyzed qualitative data from in-depth interviews with Roma and a focus group discussion with Roma respondents aged up to 30 years, regarding strategies for dealing with discrimination and the role of digitalization in overcoming the risks of ethnic discrimination in the search for jobs. The multiple inequalities faced by young women of Roma ethnicity are characterized in the light of the concept of intersectionality. In conclusion, the European Strategy for Youth Employment and the Strategy for Roma Integration are commented on as regards the obstacles to their greater effectiveness in the Bulgarian context.

The article seeks to answer three main questions. First, to what extent are Bulgarian Roma discriminated against in Bulgaria compared with those living in Croatia, Slovenia and Montenegro? Second, to what extent do the Roma work on a computer at their workplace and what activities do they perform there? And thirdly, what is the labor market situation of Roma women with children? How do they balance work with childcare? What activities do they perform at work?

The main thesis of the article is that the Roma ethnic group is subjected to discrimination in work. In the case of Roma women, we can say that there is multiple exclusion based on ethnicity and gender. Roma women are not preferred for employment for two main reasons - either they are about to have children or they already have children to care for. For their part, Roma women with children are forced to work in jobs below their acquired education level and qualification, often part time, in order to combine providing income for the family with raising children.

By increasing digital skills and education, discriminatory practices can be avoided and ethnic boundaries in communication can be removed. The existing negative stereotypes and prejudices against the Roma in Bulgarian society cannot be ignored. By making efforts to achieve professional qualification and digital education, the Roma can, albeit with difficulty, change negative stereotypes about themselves in the workplace. One of the ways to deal with discrimination against the Roma ethnic group is „the process of integration of Bulgarian society on ethnic grounds, which means removing the significance of ethnic grounds“ (Grekova, 2018:236).

## **Relevance of the topic**

According to data from the report „Discrimination against the Roma in Bulgaria and Croatia“, prepared for the period March-June 2021 within the framework of the project „ERELA - Equality for the Roma through extended access to legal aid“, financed by the Program for Rights, Equality and Citizenship of the European Union,



86% of Roma do not report discrimination when they encounter it. The results of the survey also show that 72% of Roma do not know if there is a law that prohibits discrimination. Based on the results, we find that the Roma feel most discriminated in terms of education, work, health care and finding a place to live. The data show that the Roma in Bulgaria do not feel they have equal access to jobs.

According to data from a national representative survey conducted under the project „New approaches to generating data on hard-to-reach populations at risk of having their rights violated” (NSI/FRA 2020 Survey), conducted in September 2020, the majority (53%) of people who identify themselves as Roma and aged between 20 and 64 are unemployed. The Roma are the minority group with the highest share of unemployment. By comparison, 35% of the unemployed are from the Turkish ethnic group, and 20% from the Bulgarian ethnic group.

The distribution of working/unworking Roma by gender is of interest for our study. The results show that 63% of male Roma are in paid work, and most of the Roma women, 69%, are not working. According to the study, three main factors, often combined, contribute to the low employment rate of Roma women: their level of completed education, ethnic discrimination and Roma culture (the patriarchal order in the family).

One of the reasons for the high unemployment rate among Roma is the low level of digital culture. The results show that 64% of Roma who do not work, study or receive training do not use a computer and a tablet, and one third, 36%, of those who work do not use a computer or a tablet.

Data from the NSI and the European Union Agency for Fundamental Rights (FRA) show that 27% of the Roma feel discriminated against when looking for work, compared with 16% of ethnic Bulgarians and 10% of Bulgarian Turks. 11% of Roma feel discriminated against at work, compared with 2% of Bulgarians and 3% of Turks.

In view of the presented results, it can be concluded that there is discrimination against the Roma in the labor market. As a result, a large part of them - more than half of the Roma in Bulgaria (53%) - are unemployed. The majority of Roma women are not included in the labor market, and a large proportion of non-working Roma have low or almost no digital literacy, with a third of them feeling discriminated against when looking for work.

### **A theoretical model**

Digital inequality is present in many spheres of social life. As the Internet evolves, forms of digital inequality spread, evolve and mutate. It is increasingly noticeable that digital literacy and digital capital play a key role in social life and the labor market. Digitally literate individuals participate fully in the social world and labor, and enjoy an advantage over their digitally disadvantaged counterparts. When studying the forms of digital inequality, it is important to consider the social, economic and cultural aspects of digitalization. Digital inequalities combine with characteristics such as gender, ethnicity, race.

The approach taken in this analysis assumes that ethnicity and gender can be determinants of digital and Internet skills and their use. The primary thesis is that digital inequalities reinforce existing social inequalities and may even enhance them, because they transfer existing differences.

### **Digital inequalities by gender**

Our analysis is based on the concept that men and women build different kinds of social capital, have different educational achievements, different job opportunities and, accordingly, different digital capabilities and competencies. Women are more likely to underestimate their digital skills, use the Internet less often, perform a smaller range of online activities, and generally have poorer digital skills (Hargittai and Shaw, 2015). The aim of the analysis is to establish the grounds of these digital inequalities between men and women, to discover the mechanisms underlying these differences and to infer the resulting consequences. Do women use computers, the Internet and mobile devices to the same extent as men?

The gender differences that do exist are in terms of the range of activities men and women perform on the Internet. Compared to men, women have a lower frequency of Internet use (Wasserman and Richmond-Abbott, 2005), have a lower intensity of use (Hargittai, 2010) and a narrower range of Internet (Hargittai and Shafer, 2006). Internet behavior of women is related to their social roles in society, and the interests and expectations that exist in society. Women tend to use the Internet to a greater extent for communication and social contacts (Cotten and Jelenewicz, 2006). Their consumer behavior online is related to the social roles they play in offline society. This behavior is an extension of broader social roles, interests and expectations in society (Colley and Maltby, 2008). According to recent studies, the intersection of gender and digital inequalities along two lines – firstly, through the reproduction of the gendered reproduction, and secondly, through gendered labor market processes and workplaces.

### **Digital inequalities by ethnicity**

Different social groups in society occupy different positions in the stratification system, which particularly applies to ethnic minorities. It is important to trace and analyze the access and use of digital technologies by different ethnicities and to see how their digital lives lead to the reduction or amplification of social and labor inequalities (Chen, 2013). The use of digital technologies is associated with differential access to informational, social, cultural and political resources (Mesch, Mano and Tsamir, 2012). For this reason, it is important to track the engagement of different ethnicities with these technologies; because, from a global perspective, digital inequalities increase ethnic and racial differences.

The main hypothesis on which the article is based is that the use of digital technologies reproduces the existing social inequalities in society. Digital networks replicate offline social network structures and offline human capital is transferred into the digital world (DiMaggio and Garip, 2012). Studies have shown that disadvantaged minorities have less social capital (DiPrete et al 2011). The hypothesis here is that such a pattern will be repeated in the digital world. The level of Internet use among ethnic minorities is generally lower than among the majority ethnic group, but social media use and the creation of content among minorities is expected to be higher (Schradi, 2012).

The concept of intersectionality (McCall, 2005) will be used to analyze the research problem. An intersectional approach will be taken to explain inequalities. This approach examines the relationships between identity, social context and social inequalities. Intersectionality is a concept that enables examining the relationship between different social categories that have a bearing on inequality, such as class, ethnicity, gender, age, health status. It takes into account the different ways in which different social categories intersect, connect and interact. Researchers have designated the concept as the most significant paradigm for women's studies.

Most research concentrates on a single category, such as gender, race, or class; and relevant researchers are rarely interested in findings related to other categories (McCall, 2005). The complexity of intersectionality allows exploring and clarifying the factors that simultaneously work to explain the choices a person makes. Through an intersectional approach, the influence of gender, ethnicity and social class can be determined in their interconnectedness, whereby each category is important and yet their combination complicates their mutual influence and overlap. The strength of intersectional analysis is that it does not assume any single social category is privileged or marginal. A combination of structural factors may, for example, lead to a situation where women of a given ethnic group are privileged over men of the same ethnicity. The multiple inequalities faced by young Roma women are characterized in the light of the concept of intersectionality.

## **Data and method**

The social problem that the article examines is discrimination based on ethnicity among young people (aged up to 30 year) in Bulgaria, Croatia, Slovenia and Montenegro. The role of digital inequality among the Roma ethnic group, and how it contributes to the transmission of existing social inequalities, is also analyzed. A secondary comparative analysis was made of quantitative data from the European Social Survey (April 2021) related to young people up to the age of 30 in Bulgaria, Croatia, Slovenia and Montenegro as to whether they had been discriminated against. In addition, we analyzed qualitative data obtained from a survey, conducted in March 2023, on young Roma under the age of 30 in the city of Sofia, "Faculty" neighborhood; the data are relevant to the role of digitalization in overcoming marginalization in

society. Finally, data from the European Strategy for Youth Employment and the Strategy for Roma Integration were analyzed with regard to the existing obstacles to the strategy's greater effectiveness in the Bulgarian context.

### Analysis of results

The results of the European Social Survey show that Slovenia and Croatia are the countries in which young people under 30 use the Internet to the greatest extent: almost 92% of respondents use it every day. In Bulgaria, 90% of respondents use the Internet every day. The lowest share of daily use of the Internet by young people was registered in Montenegro, 87%. In Croatia and Montenegro, 6% of young people use the Internet most days of the week. In Bulgaria, 2% of young people under 30 do not use the Internet at all; in Montenegro and Slovenia, 1% of young people do not use the Internet at all. There are no young people in Croatia who do not use the Internet at all during the week.

Based on these data, we can summarize that almost all young people in Bulgaria and Southeastern Europe have access to and use the Internet intensively (every day), the largest shares being in Slovenia and Croatia; in the latter country, there are no young people who are not Internet users.

Internet use						
			Country			
			Bulgaria	Croatia	Montenegro	Slovenia
Internet use, how often	Never	% within Country	1.9%	.3%	.7%	.8%
	Only occasionally	% within Country	1.9%	1.0%	2.3%	.8%
	A few times a week	% within Country	1.6%	1.0%	3.7%	2.5%
	Most days	% within Country	4.4%	6.1%	6.3%	4.1%
	Every day	% within Country	90.2%	91.5%	87.0%	91.8%
Total		% within Country	100.0%	100.0%	100.0%	100.0%

Source: European Social Survey, 2021 y.

Bulgaria is the country with the largest share of young people who feel discriminated against on the basis of their ethnicity (6%) in co.mparison with the other countries of Southeastern Europe. The second largest share of youths discriminated against on the ground of ethnicity is found in Montenegro (3%), and the lowest degree of ethnic discrimination is indicated in Croatia (1%) and Slovenia (1%)

Discrimination of respondent's group: ethnic group							
			Country				Total
			Bulgaria	Croatia	Montenegro	Slovenia	
Do you feel discriminated against on the basis of ethnic group?	Not marked						
		% within Country	94.0%	99.0%	96.7%	98.8%	96.8%
	Marked						
		% within Country	6.0%	1.0%	3.3%	1.2%	3.2%
Total							
		% within Country	100.0%	100.0%	100.0%	100.0%	100.0%

Source: European Social Survey, 2021 y.

In Montenegro and Slovenia, nearly 2% of young people are discriminated against on the basis of their gender, while in Bulgaria and Croatia, no gender discrimination was registered among young people under the age of 30.

Discrimination of respondent's group: gender							
			Country				Total
			Bulgaria	Croatia	Montenegro	Slovenia	
Do you feel discriminated against on the basis of gender?	Not marked						
		% within Country	99.7%	100.0%	97.7%	98.0%	98.9%
	Marked						
		% within Country	.3%	0.0%	2.3%	2.0%	1.1%
Total							
		% within Country	100.0%	100.0%	100.0%	100.0%	

Source: European Social Survey, 2021 y.

For Bulgaria, we can generalize that among young people up to the age of 30, there is stronger discrimination based on ethnicity than in the other countries of Southeastern Europe, but no discrimination by gender. We find the presence of gender discrimination among young people in Slovenia and Montenegro.

In addition to ethnicity, Bulgaria also has the highest share of racial discrimination (5%) against young people among the countries in question. There is no racial discrimination in Montenegro and Slovenia, and in Croatia 1% of young people are racially discriminated against.

Discrimination of respondent's group: colour or race							
			Country				Total
			Bulgaria	Croatia	Montenegro	Slovenia	
Do you feel discriminated against on the basis of colour or race?	Not marked						
		% within Country	94.8%	99.3%	99.7%	100.0%	98.2%
	Marked						
		% within Country	5.2%	.7%	.3%	0.0%	1.8%
Total							
		% within Country	100.0%	100.0%	100.0%	100.0%	

Source: European Social Survey, 2021 y.

The most strongly discriminated against on the basis of religion are young people in Montenegro (5%). In Bulgaria and Croatia, 2% of young people feel religiously discriminated against, and in Slovenia there is no indicated discrimination on the basis of religion against young people under 30.

Discrimination of respondent's group: religion							
			Country				Total
			Bulgaria	Croatia	Montenegro	Slovenia	
Do you feel discriminated against on the basis of religion?	Not marked						
		% within Country	97.8%	98.0%	94.7%	99.6%	97.4%
	Marked						
		% within Country	2.2%	2.0%	5.3%	.4%	2.6%
Total							
		% within Country	100.0%	100.0%	100.0%	100.0%	100.0%

Source: European Social Survey, 2021 y.

Montenegro is the country where young people feel most discriminated against on the basis of nationality (8%); in Slovenia no young people under the age of 30 indicated that they were discriminated against on this basis. In Bulgaria and Croatia, 2% of young people indicated that they were discriminated against on the basis of nationality.

Discrimination of respondent's group: nationality							
			Country				Total
			Bulgaria	Croatia	Montenegro	Slovenia	
Do you feel discriminated against on the basis of nationality?	Not marked						
		% within Country	99.2%	98.3%	92.4%	99.6%	97.3%
	Marked						
		% within Country	.8%	1.7%	7.6%	.4%	2.7%
Total							
		% within Country	100.0%	100.0%	100.0%	100.0%	100.0%

Source: European Social Survey, 2021 y.

In Slovenia, no young people up to the age of 30 indicated linguistic discrimination; in Croatia 1% of young people declared being discriminated against on the basis of language; so did 2% of youths in Bulgaria and Montenegro (2%).

Discrimination of respondent's group: language							
			Country				Total
			Bulgaria	Croatia	Montenegro	Slovenia	
Do you feel discriminated against on the basis of language?	Not marked						
		% within Country	98.1%	99.0%	98.3%	100.0%	98.8%
	Marked						
		% within Country	1.9%	1.0%	1.7%	0.0%	1.2%
Total							
		% within Country	100.0%	100.0%	100.0%	100.0%	

Source: European Social Survey, 2021 y.

For Bulgaria, Croatia, Montenegro and Slovenia, it can be said that young people under the age of 30 feel approximately equally discriminated against on the basis of sexual orientation. In all four countries, 1 or nearly 1% of young people indicated that they were sexually discriminated against.

Discrimination of respondent's group: sexuality							
			Country				Total
			Bulgaria	Croatia	Montenegro	Slovenia	
Do you feel discriminated against on the basis of sexuality?	Not marked						
		% within Country	98.9%	99.0%	99.3%	99.2%	99.1%
	Marked						
		% within Country	1.1%	1.0%	.7%	.8%	.9%
Total							
		% within Country	100.0%	100.0%	100.0%	100.0%	100.0%

Source: European Social Survey, 2021 y.

Based on the comparative quantitative analysis of the results of the European Social Survey, it can be concluded that young people up to the age of 30 in Bulgaria are most discriminated against on the basis of ethnicity and race. In Bulgaria, there is no gender discrimination against young people. There is also no such in Croatia. In Slovenia there is no discrimination on the basis of language, religion, race and nationality. In Montenegro, young people most often indicated discrimination based on ethnicity, gender and religion.

According to the results of a group discussion with young Roma aged up to 30<sup>1</sup>, although they have access to the Internet at their workplace, the activities they perform are generally rather elementary, not demanding qualification or higher computer and digital skills. Almost all the Roma participants stated that they were self-taught and personally assessed their skills as basic.

*"...My skills are at an easy level, at a simple level. We work with Microsoft office. It's nothing special."*

(man, Roma, aged 29 years, primary education, works in a roof waterproofing company)

*"...I can't say I'm a super IT guy. But my skills are enough to do my job well and properly... here in this organization, one should have at least basic computer skills. Like they said, Microsoft Office."*

female, Roma, aged 19 years, works as a social worker in an NGO

However, it can be said that the computer skills of Roma men are at a higher level than those of Roma women.

*"...We do advertisements, we do offers, quantitative calculations, which we have learned over time. I didn't study anywhere..."*

(man, Roma, aged 29 years, primary education, works in a roof waterproofing company)

*"...I also use the Internet because the Internet provides us with addresses and work to find addresses. The taxi application itself - intensive. And most of the time, I use the Internet to pass the time – movies, Facebook, things like that..."*

(male, aged 27 years, secondary education, taxi driver)

<sup>1</sup> This was a group discussion conducted under the project "Digital divide and social inequalities: levels, actors and interactions".

Roma women find that the Internet helps them in their work, but they say that they can do their work without the Internet.

*„...Yes, it makes work easier, but at the same time, it can be done without the Internet. It hasn't always worked with the Internet, so it wouldn't be a big deal. I can do my tasks even without Internet....”*

(female, aged 21 years, secondary education, teacher in an NGO)

*„...I don't work with a computer... I write the apology notes by hand. I wash the spatulas that are used to examine the children's throats, bring the patients in, direct them to the office they should go to. Kind of like an assistant... We use the Internet. For example, an old lady came and asked how many pills she should take daily. I also open [the Internet] according to weight and age and we find what we need. Everything else is examinations and immunizations. We don't need the Internet or a computer for those...”*

(female, aged 25 years, secondary education, doctor's assistant at a Roma polyclinic medical center)

It becomes clear from the group discussion that Roma women do not often use the Internet in their work. When they do, it is mainly to check for information or perform activities that do not require professional and work competencies.

*„...We work with the Internet because it is useful for us and helps us gather all kinds of information about what we are interested in, the problem we are targeting, information about certain things such as GPs, making appointments, individual institutions...”*

(female, Roma, aged 19 years, works as a social worker in an NGO)

Roma women perform a limited range of online activities that are not complex; hence, they have no opportunity to improve their digital and computer literacy in their work. This is also one of the main causes of digital gender-based inequalities among Roma women. It is made clear in the discussion that men use the Internet at work more than women, and perform more complex activities.

*“...We do advertisements, we do offers, quantitative calculations, which we have learned over time. I didn't study anywhere...”*

(man, Roma, 29 years old, primary education, works in a roof waterproofing company)

### **Internet behavior of Roma women related to the social roles they perform in their lives**

Women use the Internet mainly for Internet communication and social contacts.

*“Where do you go online, what do you use?”*

*- Google, Facebook, Tik-Tok, Viber...”*

(woman, Roma, 25 years old, secondary education, hygienist)



*"...I don't use apps very often to connect with relatives and friends - less often. Like my wife [does], her cousin is in Spain, her mother is in Germany, her aunt is in Austria. And they are in constant contact. They hear each other every day and she is more active with talking [with them]. When I talk [with them], I talk for a minute or two or three a day..."*

(man, Roma, 29 years old, primary education, works in a roof waterproofing company)

*„...I also actively talk with them on the Internet - messenger mainly. He might be in the house next to me, but I have to call to see if he's home so I can go. Otherwise I'm not comfortable going in like that. Constantly in use..."*

(female, 21 years old, secondary education, teacher in an NGO)

*"...My skills are normal. If I talk to myself on Messenger all day, then I'm great..."*

(female, 25 years old, secondary education, doctor's assistant at the Roma polyclinic medical center)

The survey results clearly show that the Roma are not given digital or computer training at the workplace, but all of them would like to be trained and improve their digital skills. Only the newly-hired employees are given instructions a single time about the computer activities they must perform at the workplace.

*I: And who trained you on this application?*

*– In the company.*

*I: A colleague in the company?*

*– No, an employee in the company who deals with the internal affairs of the systems. It is presented for 5 minutes.*

(male, 27 years old, secondary education, taxi driver)

All respondents stated that they were doing routine, repetitive actions on the computer, which they had learned and reinforced over time; they found there was nothing more to learn in their work.

*„...I don't miss anything at this stage either. I know what I work with in terms of a program, an action and so on. Maybe something in the future, if we do another type of advertising or another type of offers, maybe I'll need help with some other app, say. But at this stage, I don't find it difficult..."*

(man, Roma, 29 years old, primary education, works in a roof waterproofing company)

*"I: Do you think you need training?*

*– Not at this stage, not with this profession..."*

(male, 27 years old, secondary education, taxi driver)

*„...I also don't think that I'm missing anything, because if I hadn't been competent enough in this regard and my skills hadn't been good enough, I wouldn't have been appointed to this position. At least that's how I perceive it...”*

*(female, Roma, 19 years old, works as a social worker in an NGO)*

The Roma consider better digital skills and higher education a prerequisite for a better, more prestigious and better-paid job. All say they would improve their computer skills if they had the time and the opportunity.

*I: Do you think that if you improve your computer literacy you will have a better position?*

*– Yes. Now a friend has started a job. Deals with offers. For vacations, things like that, the pay is pretty good. Yes, to work on a computer. But you need a higher degree of computer literacy.*

*(woman, Roma, 25 years old, secondary education, hygienist)*

*I: Do you think that if you increase your computer literacy you will get a higher salary, better income?*

*–Yes. Of course. That is known [to be a fact].*

*And: Would you do it? Do you have any plans to do so in the future?*

*- Yes, I would, but you need time to attend a computer course.*

*(female, 25 years old, secondary education, doctor's assistant at the Roma polyclinic medical center)*

Women of Roma origin with children do work that requires skills below the level of their acquired education; they accept such jobs in order to combine work with childcare. Thus, the social context and the family situation are decisive for their choice of work and profession. In such cases of Roma women with children, we may say there occurs an intersection, connection and interaction between the social categories of gender and ethnicity. The combination of gender and ethnicity among Roma women with children puts them in a situation where they have to choose lower-skilled, lower-paid work in order to raise their children. We can thus explain the choice made by Mila<sup>2</sup>, a Roma girl with secondary education, who has professional training as a confectioner but works as a hygienist part-time in order to be able to combine her work with caring for her child. Here we see clearly how the relationship between ethnicity and gender determines a young woman's choice of work. Mila would like to work at a better-paid and more qualified job, but her family situation, the need to care for a child, does not allow her to do so at present.

*I: And in general, would you like to study computer technology? To get qualified?*

*Mila: Yes, yes, yes. Yes, however, for me, my work is related to the child. I can work at a better job, but there is no one to look after my child at this stage. I'm just looking for something to reconcile work and the child, because my job, which*

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<sup>2</sup> For the purpose of anonymity, the name of the respondent has been changed.

*I can work, must be 12 hours on schedule. I'm basically a confectioner and pastry chef, but there's no way, there's no way. There are no [jobs with] working hours under 8 hours, there is nowhere to find one [such a job]. My child, for example, is in kindergarten until 2 o'clock and there is no way to have someone look after him. And I need something to...*

*I: And that's why you chose this profession, because of the convenient working hours. And to work as a confectioner you have to work 12 hours per shift.*

*Mila: Yes, because I can look after my child. 8 and 12 hour shifts. Nothing less. Nowhere.*

*And what kind of job do you want?*

*Mila: Something in a profession that I like to do. For example, a confectionery shop.*

*K: And do you think that you will have the opportunity in the future?*

*Mila: Yes. I think so.*

*K: When the child grows up or...?*

*Mila: Yes, at least starts first grade.*

*(woman, Roma, 25 years old, secondary education, hygienist)*

The situation is the same for Diana, who works at the Roma polyclinic medical center for four hours a day in order to be able to raise her children. She, too, would like to improve her computer skills and have a higher-skilled and better-paid job, but, as in Mila's case, the need to take care of the children determines her choice of profession and working hours. Unlike Mila, Diana does not have a job below her education level and qualifications, but has chosen a lower-paid part-time job in order to take care of her family. And here we see how ethnicity and gender intersect and interact, determining the choice of job and working hours for Roma women with children.

*"...Yes, I would, but you need time to take a computer course. And I don't have that [time] because I have two small children. This makes it easier for me - my working hours are perfect - I am appointed at four hours [job] - from 8 to 12 o'clock. I have time to pick up my children from school, kindergarten. But otherwise, yes, I think so. If I were at a better level with the computer, I would also have a better-paying job..."*

*(female, 25 years old, secondary education, doctor's assistant at the Roma polyclini medical center)*

To summarize, based on the group discussion, it can be said that the Roma generally have only basic digital skills. They say they perform only elementary Internet activities in their work, tasks that very often can be done without the Internet. The time they work on a computer during the workday is relatively short, and activities are often restricted to the „office“. However, Roma men perform slightly more complex activities on a computer, tablet or phone – they make offers, advertise, calculate bills, work with applications. The activities performed by Roma women on

a computer in their work require relatively much shorter Internet time and relatively more elementary operations, being limited to typing on a computer and working with basic programs.

Roma women use social networks for communication to a much greater extent than men. Roma women with children do work that is below the level of their acquired education and profession; it is often part-time work, which they can combine with raising children. Because they often have to do unskilled work, they lose their digital skills, thus being doubly excluded from working life. Firstly, because they are Roma; secondly, because they are Roma women with children; and thirdly, because of their low education level and poor digital literacy. For Roma women with children, the combination of ethnicity and gender has a negative impact on finding a job; these women must make greater effort to acquire the qualification (digital education, upskilling) needed to find a better job.

All participants in the discussion stated they did not need additional skills and qualifications for the work they were currently doing and that they already knew everything they needed to know to do their job as required. All stated that they wanted to improve their digital skills and computer literacy, believing that this would help them find better-paid and more fulfilling jobs.

One of the key actions in the European Youth Employment Strategy is related to avoiding all forms of discrimination against young people up to the age of 29, related to ethnicity, gender, sexuality, race, etc., as well as discrimination in securing and finding a job, acquiring an education or participating in internship programs. The Strategy envisages vocational training and education to be flexible, learner-centred, and supportive of diversity and inclusion; it also refers to digital learning and digital technologies.

The Roma Integration Strategy emphasizes the problem of discrimination against Roma with regard to purchasing a home, access to health services, education, working environment and employment. By 2020, the relative share of Roma over the age of 16 who were subjected to discrimination for any reason was 17.9%. The minimal targets for 2030 proposed by the European Commission are to reduce by at least a half the of Roma who are subjected to discrimination, and doubling the share of Roma who report they have been subjected to discrimination.

## **Conclusion and inferences**

Based on the secondary quantitative analysis of data from the European Social Survey, April 2021, we can conclude that the basis on which young people aged up to 30 in Bulgaria are most discriminated against is ethnicity and race. On the other hand, there is no gender-based discrimination against these people in Bulgaria. In Montenegro, young people most often indicated discrimination based on ethnicity, gender and religion.

Based on the focus group discussion with young Roma under the age of 30, we find their digital culture is generally at an elementary level. At their workplace, they

work only a small part of the time on a computer, and perform only elementary operations on it. The Roma do not think they need any additional qualifications to be able to perform their professional duties, but they all state that they would like to take a computer course in order to improve their digital culture and skills. Women are more active in social networks and use the Internet mainly for communication.

Roma women with children work part-time at jobs requiring less than their level of acquired specialty and education; they choose such jobs in order to combine their work with childcare. Because of this, they often work in lower-skilled jobs that do not require high digital skills, and thereby lose their computer competency and qualification. Their plans for a better and more qualified job are connected with the time when their children will be grown and will no longer need care.

The European Youth Employment Strategy places a strong emphasis on eliminating all types of discrimination against young people aged up to 29 years, and emphasizes digital education and digital training. An important finding is that Roma youths would like to obtain, and have a positive attitude to, qualification and digital training, which would be an important step to finding a job and gradually building a positive attitude among their colleagues. Ethnicity and gender continue to have a negative meaning for the Roma and great efforts are needed to eliminate negative stereotypes, prejudices, and discriminatory practices of rejection and non-acceptance towards them.

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**About the author:** Katerina Borislavova Katsarska, PhD, Institute of Philosophy and Sociology, Bulgarian Academy of Sciences, Senior Assistant Professor.

# European Dimensions of the Modern Identity of Young People in Bulgaria

Albena Nakova

**Abstract.** *Based on the findings of a national representative social survey conducted in 2021 within the project „National and European Dimensions of the Modern Identity of Bulgarian Citizens“ (KP06-H50/6/30.11.2020), funded by the National Science Fund, the article traces the transformations in the identity of young people in Bulgaria in today's world of increased mobility, migration and communication with people of other ethnicities and nations – trends that are changing the meaning of national borders, breaking down the closedness of national cultures, and leading to the formation of a supranational identity. The interest in the identity of young people (aged 18-30 years) stems from the fact that this is the social group most liable to migration, most often traveling, studying, working and settling abroad; these are also the people whose self-perception determines the future of the relation between national and supranational identity in Bulgaria. The article presents the specificity of their self-perception and the place of European/supranational identity in their self-identification. The results of the national representative survey show that, although at this stage national identity is the leading and defining factor of self-identification of young people in Bulgaria, the formation of a supranational/European identity has begun among young people (to the extent that more than one third of them feel they belong to Europe and identify themselves as EU citizens) and represents an important element of their self-identification.*

**Keywords:** national identity, European identity, young people, migration, globalization.

Today we live in a world characterized by extraordinary dynamism of social processes and transformations, including the growing role of information and communication, which are changing the meaning of national borders, eliminating the closedness of cultures and creating „a new reality with its own characteristics and forms“ (Albrow, 1996), most often defined as global. Mobility and change are becoming major characteristics of this new age. Economic, informational, environmental, cultural, and other, factors increasingly cross and minimize the importance of national borders. In the previous century the nation-state was an instrument for preserving the freedom and independence of autonomous peoples and nations; today, as Bauman notes (Bauman, 2000; Bauman, 2007), this instrument does not function in relations between European states within the EU, of which Bulgaria is part. At the end of the 20<sup>th</sup> and beginning of the 21<sup>st</sup> century, a unique situation came about in European societies, which can be defined as a change in the notion of national community -

from a value defined through the inviolability of national sovereignty, to a more open perspective in which cooperation, collaboration, mutual interest and empathy with otherness become dominant. The state as constituting a particular identity begins to increasingly become a technical element of relations between different communities. The intensified integration between European countries, which has become particularly intense since the beginning of the new century with the enlargement of the EU, has led to significant changes in the identity of European citizens. When borders are increasingly open and vast distances are crossed in a very short time, questions of identity change become increasingly important. It is precisely the crucial importance of migration in the modern era that pushes to the forefront the significance of multiple processes related to the destruction of stable traditions, values, notions built up over centuries, the transfer of new traditions, values and patterns of behavior typical of the host societies, the formation of elements of a supranational identity, as a specific hybrid identity, as a mix of common human values, ideas and practices, in which the dominant elements are not those that separate and divide peoples and nations, but those that unite them through the experience of otherness. Migration becomes one of the leading factors that make it possible for the individual, as a bearer of ethnic and national specificities, to begin to relate not to the ethnic and national, but to the supranational and global civil society, which expresses common human values, ideas and practices. The more people travel and live outside their homeland, the more they begin to realize the endless opportunities offered by integration and globalization. The question that arises in this regard, however, is to what extent that „cosmopolitan consciousness“ has developed in individual and group consciousness to a level that corresponds to the current state of interconnectedness and interdependence between European states; because the integration of a country into various supranational EU organisations does not always entail a corresponding change at the level of public consciousness and does not always imply a weakening of national identity and the development of a supranational European identity. Integration creates opportunities for such processes to take place, but whether they will begin, and how far they will go depends on the interplay of many other factors, both internal and external.

Bulgaria and Bulgarian citizens have been involved in the contemporary processes of globalization and integration for about three decades, with gradually increasing intensity. Today Bulgarian national identity is in a period of constant transformation. Bulgarian citizens are beginning to feel and define themselves as European citizens or as citizens of the world. And this is happening not in the course of a hundred or a hundred and fifty years, as such changes did in the past, but in a much shorter span of time. Transformation is occurring in all spheres of social life, becoming a constant feature there. It permeates both society and public consciousness, changing them ever more rapidly. Thus, the specificity of social development logically leads to the establishment of the supranational European identity.

In the „traditional“ self-identification of Bulgarian citizens, the relationship with Europe is present as one of the dimensions of national identity. Under the influence of EU integration, however, this relationship has been significantly rethought.



More than 15 years after Bulgaria's accession to the European Union, under the influence of various international and national political, socio-economic, cultural, demographic, educational and other factors, Bulgarian citizens' perceptions of themselves as part of Europe are evolving. The transformation of our country into a part of the European Community in various aspects – ranging from the transposition of European legislation into the national laws, participation in common EU policies and programs, the (automatic) acquisition of European citizenship, the work of the European institutions on the territory of the country, the mobility of Bulgarian citizens across EU countries, to the incorporation of European symbols into the everyday and festive culture (flag, anthem, Europe Day, etc.) - determines the changes in national self-awareness and self-identification. Internationally, the country's European integration has also led to a change in the geopolitical connotations of its location, from „Balkan“ and „Southeast European“ to „European“ and „external border of the EU“. Through European influences and intercultural interactions, not only are the geopolitical connotations of Bulgaria changing, but Bulgarian citizens are reconstructing the perception of themselves as part of Europe. And if identity is a conscious self-reference to a structured normative-value system that includes basic attributes of the respective community to which we relate, then the changes that are occurring in the relationship of Bulgarian citizens to Europe, not only geographically, but also in terms of values and norms, entail changes in the development of the national identity towards formation of elements of a supranational European identity.

The scientific interpretation of the formation of supranational/European identity is still in a period of conceptual search for new theoretical schemes that may „describe“ it. Since the 1990s, in the context of globalization, when the boundaries between different nations and ethnicities have become increasingly thin and permeable, and cultural interactions more intense, research interest has turned towards defining identity as multiple and hybrid within the concepts of cultural pluralism or multiculturalism (Taylor, 1994; Caglar, 1997). And increased migration processes are leading to new phenomena and consequently to the development of new theoretical frameworks for their study, such as transnationalism and methodological nationalism (Vetrovec, 2007; Schiller et al., 2007).

Examples of such theory can be found in the works of Anthony Smith, Charles Taylor, Jean-Marc Ferry, Terry Eagleton, Jacques Attali, and others. In 1991 Smith discussed the challenges to the European project, seen as a model for supranationalism, and the prospects for a European „super-nation“ (Smith, 1991). The publication in 1992 of Taylor's book *Multiculturalism. Examining the Politics of Recognition* started a discussion on the trends of changing identity resulting from the fact that, in the course of globalization, most states have become less able to resolve various problems and are delegating much of their authority to local government or to supranational structures and organizations. As a consequence, new forms of identity are undermining the previous narrow identification with the nation-state. Jean-Marc Ferry has developed the idea of post-national identity related to the principles of universality, autonomy and responsibility. Eagleton uses the concept of global

identity (Eagleton, 2000), while Albrow refers to the relativization of identity in the global time that comes after modernity (Albrow, 1996). The idea of the formation of a European identity as a kind of supranational identity was also discussed by a number of authors in the beginning of the 21st century. Here we may mention the theories of Walkenhorst (2009) or Ovunc Ongur (2010), who develop the idea of European identity as one of the many identities that individuals build based on their affiliation to different social groups. These authors also claim that the different forms of identity (for instance, European, national, regional) are not necessarily rivals. According to other contemporary social scientists (Miller, 2012; Day et al., 2012), the context-based concept of identity corresponds most fully to the supranational nature of European identity. This concept links the definition of the various and heterogeneous dimensions of European identity to concrete social, cultural, etc., contexts.

But although some researchers (Schütze, 2011; Schütze, Schroder-Wildhagen, 2012) talk about the growing perception of “Europe as a mental space”, they define this space mostly as a collective mental image of Europe rather than as a formation of collective identities that might help create “an integrated, albeit culturally differentiated and branched European demos” and might “provoke the crystallization of an obvious self-identification as a European person”. On the other hand, the view of “Europe as a mental space” refers to a very important dimension – namely, the horizons, reference frameworks (according to the terminology of Alfred Schutz), the criteria and rules that reveal the connections between the elements of a supranational world serving as a reference community for the formation of an identity.

Contemporary studies on identity, and European identity in particular, have shown that the characteristic feature of European identity is its multidimensionality, the superimposition and reconciliation of multiple layers of (self-)identification of the European individual, which become relevant in different contexts, depending on the specific life situation. To what extent these elements of European identity have appeared and what structural changes are occurring in the national identity of Bulgarian citizens, I will try to show through the results of an empirical sociological survey conducted by the Institute of Ethnology and Folklore Studies with Ethnographic Museum at BAS in 2021 within the project „National and European Dimensions of the Modern Identity of Bulgarian Citizens“ (KP06-H50/6/30.11. 2020, funded by the National Science Fund), in which I took part.

This was a nationally representative survey of Bulgarian citizens aged 18+, conducted with a two-stage cluster sample of 1,014 Bulgarian citizens, which was designed by simple random sampling. This number of respondents provide representative data for the population of the country. Standardized interviews were used to collect statistical data. Through this survey we aimed to explore how Bulgarian citizens define their identity today and whether European identity has a place in the identity structure of Bulgarian citizens in the contemporary context of increased

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<sup>1</sup> [https://ec.europa.eu/research/social-sciences/pdf/policy\\_reviews/development-of-european-identity-identities\\_en.pdf](https://ec.europa.eu/research/social-sciences/pdf/policy_reviews/development-of-european-identity-identities_en.pdf)

migration processes, inter-national, inter-ethnic and intercultural interactions. In other words, the objective was to investigate whether the permeability of national borders implies the permeability of identity borders as well. In this article, however, I will focus on young people in Bulgaria (18-30 year olds) as the social group most influenced by migration processes, as the people who most often travel, study, work and settle abroad and at the same time as the group whose self-perception determines the future of the „national - supranational“ identity relation in Bulgaria. I will try to show the specificities of their self-perception and the place of European/supranational identity in their self-identification.

The survey questionnaire was specifically structured in such a way that the first question that all respondents had to answer referred to the three most important, in their own opinion, characteristics with which they self-identify; they were able to choose the characteristics that they considered most important for their self-identification. The purpose of this question is to ascertain how important national and/or ethnic affiliation is for the respondents' self-identification, as well as how far they identify with supranational structures, when nothing in the question suggests to them that we are looking for information about this type of identity; also, in case they indicated these identity types as important for their self-identification, they were asked to rank them in order of importance.

In answering this question, a total of 27.6% of young people in Bulgaria self-identify as Bulgarians, thus referring to national identity. Only 3.9% of them identify as citizens of the Republic of Bulgaria, a figure that emphasizes national identity even more strongly. In addition to this, for 18.2% of the surveyed youths, self-identification through national identity ranks first in the list of identity references; for 7.7%, it ranks second; and for 1.7%, third. Thus, for over 1/4 of young people in Bulgaria, self-identification through national identity is particularly important. It seems indeed important to them insofar as more than a quarter indicate this identification without any prompting, i.e., when nothing in the question suggests they are expected to give such an answer. And when, along with self-identifications referring to name, place of residence, professional and social status, age, education, family status, character qualities, etc., a quarter of the persons emphasize their national identity and affiliation, and the majority of this group of respondents mark national identity first among these references, we see it is really important for them.

At the same time, the survey results show that about 1/10 (11.1%) of all young people define themselves with reference to supranational structures. Thus, 8.3% of the interviewees identify themselves as affiliated with Europe - as citizens of Europe; and 2.8% consider themselves citizens of the world. We find that, of these supranational references, identification with Europe is largely predominant.

The comparison of responses coming from the different ethnic groups shows that self-identification through nationality is more important for ethnic Bulgarians than for others, since a total of 33.1% of them identify themselves precisely through their nationality; moreover, 22.1% of these rank the identification „Bulgarian“ first; 9.6% second; 1.5% third. And only 2.2% of the ethnic Bulgarians define themselves as

„Bulgarian citizen“, which in fact means that, for them „Bulgarian“ means precisely „Bulgarian citizen“, a citizen of Bulgaria. On the other hand, only 8.8% of the interviewed Bulgarians self-identify as „citizens of Europe“, and 3.7% as „citizens of the world“; thus, the answers of, in all, 12.5% of young people of Bulgarian ethnic origin suggest a process of formation of supranational identity occurring. Therefore, it can be said that for young Bulgarians the processes of national identity formation, i.e. the awareness and declaration of national affiliation, outstrips the processes of supranational identity formation, insofar as approximately three times more young people relate to their national than to a supranational identity.

As for the representatives of the Turkish ethnic group, 20.8% of them identify themselves as Bulgarian citizens (of which 12.5% rank this identification in first place, 4.2% rank it second and 4.2% rank it third), 16.7% as „Turk“ and 8.3% as EU citizens. Here the identification „citizens of the world“ is absent. The comparison with young people of Bulgarian ethnic origin shows that in both ethnic groups - Bulgarians and Turks - the identification with Europe is developing at the same pace among these young people, insofar as approximately equal shares of the surveyed persons in both ethnic groups declare their European identity - 8.8% in the case of ethnic Bulgarians and 8.3% in the case of ethnic Turks.

In the case of the Roma ethnic group, the identification „Bulgarian“ is characteristic for 15% of the interviewees, ranked by 5% of them in first place, by 5% in second place, and by 5% in third place. For 10% of the young Roma, the ethnic identification („Roma“) is more important, ranked by 5% of them in first place and by 5% in second place. Identification with Europe and with the world is completely absent in the case of young people of Roma origin.

In other words, it can be said that the processes of formation of a supranational, and particularly a European, identity are going at a much slower pace than the formation of a national identity. National identity is in the lead for young people in Bulgaria for now. Moreover, in the case of the Bulgarian and Turkish ethnic groups, the formation of a European identity is proceeding at the same pace, while in the case of the Roma ethnic group such identification is still absent, at least when they indicate their identity spontaneously.

However, when the question about identity is posed in a different way and the respondents are asked directly to choose from several proposed identities (including national, ethnic, European/EU citizen, global/world citizen, regional/Balkans, local/settlement, religious, professional, belonging to a certain circle of friends), ranking them in importance, then the identification with national affiliation significantly increases to an impressive 84% of young people who identify themselves as Bulgarian citizens. Moreover, the largest share of these - 69.6% - rank national identity first; 9.4% rank it second, and 5% third. For ethnic Bulgarians this proportion is even higher - 86.8% of them self-identify as Bulgarian citizens, while only 9.6% of the interviewees feel connected to the ethnic community; this confirms the above conclusion that when ethnic Bulgarians self-identify as „Bulgarians“ they have in mind national rather than ethnic affiliation; or perhaps it is more accurate to say that

they perceive national affiliation as ethnically defined. As for the Turkish and Roma ethnicities, again, the share of those who self-identify as Bulgarian citizens is the highest - 70.8% of respondents of Turkish ethnicity and 85% of Roma ethnicity.

A significant share in this case refers to supranational structures - a total of 38.7% of young people in Bulgaria identify themselves as EU citizens; 28.7% as citizens of the world; and 11.6% as connected to the Balkan region. In the case of the Bulgarian ethnic group these shares are respectively: 38.2% (EU citizen), 28.7% (world citizen) and 12.5% (connected to the Balkan region). In the case of the Turkish ethnicity, 41.7% feel they are EU citizens; 33.3% perceive themselves as citizens of the world; and 4.2% feel connected to the Balkan region. As for the Roma ethnicity, the shares here are respectively: 40% (EU citizen), 20% (world citizen) and 15% (related to the Balkan region). In other words, all three ethnic communities have a high degree of identification with supranational structures - over half of the population. Thus, a total of 67.4% of all young people in Bulgaria identify themselves with supranational structures. For the Bulgarian ethnic group the share is 66.9%; for the Turkish ethnic group 75%; and for the Roma ethnic group 60%. Identification with Europe and the EU is around 40%: 38.2% of the Bulgarian ethnic group, 41.7% for the Turkish ethnic group, 40% for the Roma ethnic group; or 38.7% overall for young people in Bulgaria.

Thus, at the current stage, the national identity turns out to be the leading and most important one for young people in Bulgaria. Supranational identity is most of all associated with belonging to Europe and the EU, less with the perception of oneself as a citizen of the world and least with the sense of connectedness to the Balkan region. Despite all the changes that national identity has undergone, it continues to be the leading identity of young people in Bulgaria at this stage. Nevertheless, there are serious indications of the formation of elements of supranational identity ("citizen of Europe", "citizen of the world", "connected to the Balkan region").

The answers to the question "How would you introduce yourself abroad?" confirm these conclusions. Here the respondents were allowed to give not more than one answer. Again, it is noteworthy that the highest proportion - 64.1% of all young people interviewed - would introduce themselves as "a Bulgarian"; 17.1% of the interviewees would introduce themselves as a citizen of the Republic of Bulgaria; 5.5% would present themselves as "Turkish"; and 5% as "Roma", i.e. the respondents would underline their ethnicity. Only 1.1% of them would introduce themselves as EU citizens, a negligible share that is below the threshold of statistical error. 6.1% would introduce themselves differently depending on the situation. Observation by ethnicity shows that 84.6% of young people of Bulgarian ethnic origin would introduce themselves as "Bulgarians"; 11% of them would introduce themselves as citizens of the Republic of Bulgaria; and only 0.7% - as EU citizens; while 2.2% would introduce themselves differently depending on the situation. Young people of Turkish ethnic origin would emphasize their ethnic origin and 41.7% of them would introduce themselves as "Turkish"; 33.3% as a citizen of the Republic of Bulgaria; only 4.2% as EU citizen; for 20.8% of them it would depend on the situation. In

the case of the Roma ethnic group, 45% would introduce themselves as “Roma”; 40% as a citizen of the Republic of Bulgaria; and 15% would choose one or another identification depending on the situation. The emphatic reference to the European and supranational identity is again absent in this group. It is again clear that when a leading reference of identity has to be chosen, the emphasis is on nationality. European identity remains in the background. In most cases it is indicated in percentages below the threshold of statistical error, i.e., insignificant. Young people of Turkish ethnic origin are an exception, but in this case, too, we are talking about only 4.2%. Nevertheless, the fact is that the beginning of the formation of a consciousness of European identity has been set. Let us see in this regard how young people in Bulgaria see the country’s place on the world geopolitical map and to what extent they see Bulgaria as connected to Europe and the EU.

The results of the survey show that the largest share, 51.4%, of young people in Bulgaria, perceive the country primarily as an EU member state. A twice lower share, 27.6%, consider it a Balkan country situated at the crossroads between East and West. And the shares of young people who see the country as oriented to cooperation with the Russian Federation (5%) or the USA (2.2%) are quite minimal. In other words, although the European identity remains in the background for young people aged 30 while the national one is leading for them, they all see Bulgaria’s place on the world geopolitical map primarily as an EU member state. This is more pronounced in the case of the Bulgarian and Turkish ethnic groups, respectively 54.4% and 54.2% of the interviewed respondents from these two ethnic groups think so, and significantly less, 25%, of the young people of Roma origin share this view.

In this regard, it is of interest how young people in Bulgaria see the most important factors linking the country to Europe.

**Table 1. Factors linking Bulgaria to Europe<sup>2</sup>**

<b>The most important factors linking Bulgaria to Europe</b>	<b>Percentage of respondents who indicated</b>
Geographical location	58.0%
Historical past	43.1%
Cultural heritage	32.0%
Common policy and legislation	24.3%
Common values	23.8%
Common economic development	17.7%
Nothing links us to Europe	2.8%
Don’t know/No answer	6.1%

<sup>2</sup> The sum of the percentages exceeds 100% as respondents indicated more than one answer.

It is noteworthy that the largest share of young people (58%) see the geographical location as the main factor linking Bulgaria to Europe. This factor has a purely territorial-spatial dimension and carries no emotional or cognitive charge of proximity. It can be said that this is the “coldest” of the factors reflecting Bulgaria’s links with Europe in the opinion of young people. The other factors they mentioned can be divided into two groups. The first group includes the factors “historical past” and “cultural heritage”, which gather a larger share of the answers and express Bulgaria’s ties with Europe as a territory/continent and a set of different countries that share a common past and cultural heritage. The second group includes the factors “common policy and legislation», “common economic development” and “common values”, which can rather be defined as factors expressing Bulgaria’s relationship with the EU as a political-economic union of European countries. Such a distinction, and the fact that the first group of factors is mentioned by a larger share of respondents, is indicative of the specificity of young people’s identification with Europe, which is with Europe as a continent rather than as a political and economic organisation of European countries. This conclusion was repeatedly confirmed in focus group discussions and in-depth interviews held within the project, where young people shared their opinion that Bulgaria and Bulgarian citizens are part of Europe by ancestry, by a history and culture that long predates the EU.

The stated perceptions of Europe and the EU indicate the distinction young people make between Europe as a territory and the EU as a politico-economic union of European states.

**Table 2. Perceptions of Europe<sup>3</sup>**

<b>What are your perceptions of Europe</b>	<b>Percentage of respondents who indicated</b>
Geographical location (continent)	35.4%
Cultural heritage	30.9%
History	27.1%
Economic union	22.6%
High standard of living	22.1%
Political union	21%
Civilization	19.9%
A place where I want to live	19.3%
Ethnic, cultural and religious diversity	17.1%
Christian religion	6.1%
Asylum for migrants and refugees	5.0%
A place where I don’t want to live	4.4%

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<sup>3</sup> The sum of the percentages exceeds 100% as respondents indicated more than one answer.

As can be seen from the table, the perception of Europe as primarily a geographical area, a cultural heritage and a history is once again confirmed. Characteristics such as “economic union», “political union”, “high living standards», which are primarily associated with the EU, gather smaller shares. Additional characteristics that describe the civilizational and ethno-cultural specificities of Europe in the perceptions of young people are “ethnic, cultural and religious diversity”, “Christian religion”, and the negative “asylum for refugees and migrants”. Significantly, a fifth (19.3%) of the young people in Bulgaria characterize Europe as the place where they want to live; only 4.4% see it as the place where they do not want to live.

With regard to the EU, the characteristics “common policy», “common legislation”, “common democratic values”, already identified above, are highlighted again. However, new characteristics of the EU also appear, such as “freedom of movement”, “common civil rights”, “access to European education”, “access to European funding”, which gather the largest share of young people’s responses and seem to mark the utilitarian side of Bulgaria’s EU membership, i.e. the benefits that young people actually feel from Bulgaria’s EU membership.

Unlike the benefits of Bulgaria’s EU membership, such features of the EU as common European institutions, common symbols (flag, anthem), which mark the very essence of the EU as a political-economic union, are of much less interest for young people. This means that the formation of a European identity in young people in Bulgaria is based primarily on awareness of the usefulness of EU membership, such as the possibility of free movement, access to European education, to European

**Table 3. The most important features of the European Union<sup>4</sup>**

<b>What do you think are the most important features of the European Union</b>	<b>Percentage of respondents who indicated</b>
Freedom of movement	44.2%
Common civil rights	38.1%
Common democratic values	32.0%
Access to European education	28.3%
Access to European funding	18.6%
Protection against discrimination	14.9%
Common legislation	12.2%
Common European institutions	11.0%
Common policy	9.4%
Common cultural heritage	7.2%
Common symbols - flag, anthem	5.0%

<sup>4</sup> The sum of the percentages exceeds 100% as respondents indicated more than one answer.



funding – things that directly concern young people and from which they actively benefit. Therefore, it is no coincidence that, when asked, “What are you personally proud of, as a citizen of the Republic of Bulgaria?”, along with such reasons for pride as Bulgarian national history, Bulgarian national culture and art, Bulgarian national traditions and customs, Bulgarian national sport, etc., nearly a quarter of young people in Bulgaria (23.2%) mention “being able to travel and work around the world as a citizen of an EU member state». Here we see that, although based on practical considerations, the developing European identity is becoming a cause of national pride as our country is a member of the European community. Thus we see how the connectedness to Europe is present as a *dimension of national identity* and how the utilitarian value, the utility of an affiliation can become the surest motive and way to reinforce the European affiliation and make it an interiorized and conscious identification. Therefore, when 70.2% of young people in Bulgaria state that they would like their children and the future generations of Bulgaria to live in Bulgaria, and only 18.2% are categorical that they prefer their children to live in Europe, this can be interpreted as a firm stand for national identity and a confirmation of national belonging, but combined with awareness of the fact that the national is part of the European and, even by its specificity, supports, enriches and strengthens Europe.

The survey results indisputably show that Bulgaria is definitely perceived by young people as a European country, as part of the EU. At the individual level, however, national identity is the determining and leading factor in the self-identification of young people at this stage of our country's development. However, the fact that 38.7% of young people in Bulgaria also identify themselves as EU citizens shows that the processes of formation of a European identity have already started and display sustainability, although at this stage the European identity is less present among young people than the national identity. In this situation, we can say that Attali's words, that we are only in the “antechamber of European identity” as a “huge ideal” rather than as a reality, are particularly relevant in our case. The pursuit of this ideal, as well as the accompanying transformation of identity, are sustained, as the survey results show, by the attractiveness of European values, the European way of life and European standards, which Bulgarian citizens strive to attain as soon as possible. But even the short phases of societal transformations usually last for several generations.

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**About the author:** Albena I. Nakova, PhD in Sociology, Associate Professor, Deputy Director, Institute of Philosophy and Sociology, Bulgarian Academy of Sciences, Sofia, Bulgaria. She is a team member of the IPS-BAS team of the project "European Foreign Policy Facing New Challenges and Perspectives: The View of Young People in Bulgaria", financed by the Bulgarian National Science Fund at the Ministry of Education and Science (Contract № KP-06-KOST/3).

# **A Sustainable and Equitable Future for All: Is it Achievable and What Comes Next for Europe?**

**Rumiana Jeleva**

In my student years, I came across two striking thoughts in the works of two major sociologists (who are among my personal favorites), Max Weber and Anthony Giddens. After the tremendous changes that swept across the so-called “Socialist bloc”, while reading in the University of Bielefeld library, I encountered Max Weber’s famous phrase, “*The economy is being politicized and politics is being economized*”<sup>1</sup>. I could not have foreseen at the time that the phenomenon Weber was talking about would assume such ugly proportions in the form of corruption during my own country’s transition to democracy. Later, in the year 2000, reading Anthony Giddens’ book *The Consequences of Modernity* (1990), I came across these words, “*The present epoch is one of stricken history - for the first time in human history, a global civilization faces the very real prospect of its own destruction*”. At the time, I felt this gloomy prospect to be exaggerated. Unfortunately, Giddens had captured with surprising foresight the gravity of the environmental challenges facing humanity today. The interconnections within the global economy, combined with the rapid growth of the human population and consumption patterns, have led to unprecedented levels of environmental degradation and resource depletion. They have resulted in pollution, climate change, and other environmental crises that threaten the very existence of human civilization. That which humans have inflicted on the planet goes hand in hand with growing social inequalities across the globe, with regional imbalances and struggles for supremacy in areas that are less developed economically but rich in raw materials and natural resources. In the years of greatest economic prosperity, before the COVID-19 pandemic, it seemed people had become complacently greedy.

The fatalistic outlook on the future of humanity considers environmental, social, and economic collapse as inevitable. This belief is often fueled by justified concerns about climate change, the loss of biodiversity, resource depletion, and other similar threats to the well-being of societies. Giddens’ words serve as a call to action by highlighting the urgent need for individuals, communities, and policymakers to take responsibility for sustainable development. Giddens points to the scale of the problem and the need for bold and decisive action. The concept and policy of sustainable development are meant to serve economic growth and social well-being

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<sup>1</sup> In the original text, „*Das Wirtschaftsleben wird politisiert, die Politik ökonomisiert.*“ – Max Weber: *Wirtschaft und Gesellschaft*. Studienausgabe, hrsg. von Johannes Winkelmann, Köln/Berlin 1964, Band 1: 222

while protecting the environment and natural resources for the present and future generations. Thus, economic and social development and environmental protection must be mutually balanced, and resources must be exploited in ways that do not compromise the ability of future generations to meet their own needs.

Sustainable development policies and practices are designed to address the very environmental threats that incline us to pessimism about mankind's future. By promoting sustainable practices in areas such as energy, agriculture, transportation, and waste management, policymakers can help mitigate the impacts of environmental challenges and create a more resilient, sustainable future for humanity. More generally, the adoption of sustainable development policies and practices can also stimulate the adoption of proactive, solutions-oriented approaches. By taking action for environmental protection and sustainable development, responsible people can raise optimism and inspire many others to work for these goals. Importantly, we should remember it is not too late for positive changes in this respect. Through collaborative efforts and innovative solutions, it is still possible to ensure a more sustainable and resilient future for humanity. The challenges are great, but so are the opportunities.

### **Concepts related to the global future**

Is the situation today really as bleak as Giddens' words suggest? What might the fate of Europeans be, what comes next after sustainable development, what should we expect beyond it?

Sustainable development is a complex, ongoing process that seeks to balance economic, social, and environmental goals so as to satisfy the needs of the present without compromising the chances of future generations. But while it is an important goal, sustainability is not the ultimate one.

Looking beyond sustainable development, some experts believe that the next step for humanity will be to focus on achieving regenerative development. This is a development that goes beyond sustainability by actively working to restore and enhance the natural environment and ecosystem services. It includes strategies such as reforestation, regenerative agriculture, and the restoration of degraded landscapes and ecosystems.

Regenerative development is a concept and approach that has been developed and expanded upon by a number of authors and practitioners in fields like ecological design, urban planning, and sustainable development. Some notable researchers and publications in this area include Mang and Reed, 2012; the Regenes Group (authors Pamela Mang and Ben Haggard 2016); Lyle 1996; Sanford 2017; and others. According to these authors, regenerative development can be defined as the co-evolutionary process of building the capacity of people and places to create thriving, adaptive, diverse communities that can persistently yield life-enhancing outcomes by learning to live within the regenerative capacity of their ecosystems (Regenes Group (Pamela Mang and Ben Haggard) 2016; Gibbons 2020). Regenerative

development is an approach to sustainable development that aims not only to avoid causing harm to the environment but also to create a positive impact by restoring and enhancing the resilience of ecosystems. For example, a regenerative development project might involve restoring a degraded area of land by reintroducing native plant species and improving soil health. This would not only help mitigate climate change by sequestering carbon, but also provide habitats for wildlife, improve local air and water quality, and create opportunities for sustainable agriculture or ecotourism. The goal is to create a self-sustaining system that yields long-term benefits for people and their environment.

But humanity's efforts should not be limited to achieving sustainability. For example, there is a growing need to address the challenges of social inequality and economic development, particularly in developing countries. Emerging technologies, fields such as artificial intelligence, biotechnology, nanotechnology, have the potential to transform the way in which we live and work, but also raise new ethical, social, and environmental challenges that, in turn, need to be addressed.

## **Next EU**

The necessity to study the rapidly changing world, the growing geopolitical competition, requires the implementation of an interdisciplinary approach which studies the relationships between geographical location, power, international relations and the external and internal social and cultural contexts. Interdisciplinary studies should be applied to the political, economic, and strategic significance of geographical locations, natural resources, and other factors that shape the behavior of states and of social actors in the world. Geopolitical factors play a critical role for the future of the EU and Europe by impacting on this continent's security, economy and political landscape. With the rise of global powers like China and India, with the dramatically changing role of Russia after its invasion of Ukraine, the EU faces tasks related to maintaining its economic and political influence in the world and strengthening its security and defence capacity. The EU also has internal problems to deal with, including the rise of nationalist movements and the ongoing debates over immigration, security, and governance. Geopolitics can help the EU navigate these challenges by providing a framework for understanding the strategic importance of different regions and resources, and for assessing the strengths and weaknesses of potential allies and adversaries. By analyzing geopolitical factors such as trade routes, energy resources, and military capabilities, the EU can develop a more strategic approach to its foreign policy and economic relationships. But these factors also have the potential to exacerbate tensions and conflicts between states, particularly if competing interests over resources or strategic locations come into play. It is therefore important for the EU to engage in constructive diplomacy and cooperation with other nations and regional organizations in order to promote stability, security, and economic prosperity in Europe and beyond.

The future evolution of the European Union will depend on a range of factors, including economic trends, political developments, and global dynamics. In the

meantime, the EU has set out a vision for its future in several key documents, including the Strategic Agenda for the Union in Times of Change (2019-2024), the European Green Deal, and the Digital Single Market strategy. The aim is to make it a more united, stronger, and more democratic union that delivers concrete results for its citizens, promotes sustainable development, and defends its values and interests in the world. The Strategic Agenda identifies key priorities, including strengthening the EU's single market, deepening the Economic and Monetary Union, building a fair and inclusive society, strengthening the role of the Union in the world, and addressing challenges such as climate change, migration, and security. The European Green Deal, launched in 2019, aims to make the EU climate-neutral by 2050 and make its economy modern, resource-efficient, and competitive. It sets out a roadmap for action in areas such as energy, transport, agriculture, and industry, social and economic policies. The Digital Single Market strategy aims to create a single market for digital goods and services, promote innovation and entrepreneurship, and ensure that the benefits of the digital economy are widely shared. It includes initiatives to promote the free flow of data, improve cybersecurity, and develop digital skills and infrastructure.

We see that, while the EU's future will be shaped by a complex mix of internal and external factors, the Union has a clear vision for that future based on sustainable development, innovation and digital skills, and democratic values.

Clearly, there is still much work to be done in this direction, involving ongoing innovation, collaboration, human capital investment and action from individuals, communities, and governments.

Europe's rich and successful history is undoubtedly one of its defining characteristics. The continent has been home to many of the world's most influential empires, kingdoms, and civilizations, which have left a lasting impact on the world. From the ancient Greeks and Romans to the Renaissance and the Enlightenment, Europe has been at the forefront of cultural, scientific and technological advance. Naturally, Europe's future success will not be entrenched in its past achievements, but will depend on its ability to adapt and respond to the challenges and opportunities. These includes trends such as climate change, globalization, technological progress, and geopolitical shifts.

Learning from the past means to reflect on and draw lessons from historical events, experiences, and mistakes, lessons that inform present and future decisions. We can gain insights by considering what worked well and why, what did not work and why. We can also gain a deeper understanding of how different societies, cultures, and systems have evolved over time, and how they have interacted with each other. By learning from the past, we can avoid repeating past mistakes, build on the successes of the past, and create a better future for ourselves and future generations. Here I will venture the opinion that nowhere else in the world have lessons been learned and conclusions drawn so well as in Europe.

This is not the only quality by which Europe differs from the rest of the world. It is true that, during the 20<sup>th</sup> century, the two most devastating wars, which set the whole

world on fire, started from Europe. But then again, recent European history offers the example of a supranational political union that acts for the peace and prosperity of more than one nation, more than one society, of all its members. Then there is the unique diversity of Europe (and the EU), a diversity of nations and cultures. With its more than 40 different countries, each with its own unique history and traditions, Europe is a melting pot of different languages, religions, and customs. Education is among the characteristics that make Europe outstanding. Europe and the EU have a highly educated population, with many of the world's top universities and research centers located within its borders – centers of learning that have produced most of the important discoveries and innovations of science and technology. This continent is also outstanding in its Social Welfare. Many European countries have strong social welfare systems, providing universal healthcare, education, and other benefits to their citizens. This has helped to create a more equitable society with smaller disparities between the rich and the poor. Political stability is also a very distinctive characteristic of Europe and the EU. Despite occasional political turmoil, Europe is generally considered to be a politically stable region. Many of its countries have well-established democracies, and there is a strong tradition of respect for human rights and the rule of law.

In concluding, I should clarify why I began my discussion with that quote from Max Weber. The great sociologist observed a trend in modern society towards increasing interdependence of economics and politics, in which economic decisions are often subject to political influence, and political decisions are in turn largely determined by economic factors. Politicized economic life means that political decisions, laws and regulations have an influence on economic and social processes. For example, politically determined tax laws, trade agreements or industrial regulations can have a direct impact on economic life and on decisions taken by economic agents. On the other hand, *economized politics* describes a development in which political decisions are increasingly influenced by economic factors (economic interests and lobbies can incline political decisions in favor of certain industries or companies over the general good).

Certainly, we cannot fully eliminate such interpenetration, but we can clarify the boundaries between the two spheres, where and when and by whom this interpenetration can be restricted. Weber's conceptual terms serve us in this clarification. The politicizing and economizing to which Weber refers should be considered in the context of his larger concept of *Lebensführung* (life conduct), which should be distinguished from the *Lebensstil* (lifestyle). *Lebensführung* refers to choice and self-direction in a person's social action. As Abel and Cockerham (2005) explain, „*Lebensführung is the element of choice within Weber's overall concept of Lebensstil (lifestyles) and joins with Lebenschancen (life chances) as one of Lebensstil's two basic components*”. Hence, people are invariably engaged in personal decisions, no matter whether they are politicizing or economizing their social actions. They have the life chance (in Weber's sense) to decide and choose how to act. Issues of boundaries, exclusions and limitations, but also exaggeration or diminution of human

rights and the rule of law, should be viewed with reference to opportunities for action. In the ideal case, any excess of politicizing or economizing should provoke struggle for restoring the balance.

Europe is not just a very good place to live. It is the home of wisdom. After centuries of destructive battles, wars and confrontations, costing millions of lives, Europeans have managed to build one of the most humane and equitable societies. Today most Europeans have as their home the only supranational political entity created through negotiation, not conquest, by listening to the opinion of Others, by respecting difference and otherness. This home is the European Union. The strength of Europeans lies in sharing with other peoples and nations the belief that such a union is possible, that achieving it is a matter of good will. Europe's strongest and most successful years have been those in which it demonstrated to the rest of the world the wisdom of the brilliant politicians and humanists who have lived on this continent. Things that give the EU its specific attractiveness – European freedoms and values, the European common market – are the results of this wisdom.

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**About the author:** Rumiana Jeleva is Associate Professor in Sociology and Senior Researcher at the Institute of Philosophy and Sociology within Bulgarian Academy of Sciences. She holds a PhD in Sociology from the University in Magdeburg, Germany; a master's degree in Sociology and Pedagogy from Sofia University, Bulgaria, and has specialized in international relations and sustainable development. She is the scientist-in-charge of the project "European Foreign Policy Facing New Challenges and Perspectives: The View of Young People in Bulgaria", financed by the Bulgarian National Science Fund at the Ministry of Education and Science (Contract № KP-06-KOST/3) and carried out by a team from the Institute of Philosophy and Sociology at Bulgarian Academy of Sciences (IPS-BAS).



Rumiana Jeleva

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