



**aleph strategies**

Renewal Evaluation the Regional Centre for the Safeguarding  
of the Intangible Cultural Heritage in South-Eastern Europe

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Final Report



Acronyms .....	3
Executive Summary.....	4
Recommendations.....	6
1. Introduction.....	7
1.1. Purpose of the review .....	7
1.2. Scope of the review .....	7
1.3. Methodology .....	7
2. Findings .....	8
2.1. Achievement of Objectives.....	9
2.1.1. Objective 1: Promoting and contributing to the implementation of 2003 Convention for the Safeguarding of the Intangible Cultural Heritage .....	9
2.1.2. Objective 2: Increasing the participation of communities, groups and individuals in safeguarding the intangible cultural heritage in the South-Eastern European countries ....	10
2.1.3. Objective 3: enhance the capacity of UNESCO's South-Eastern European Member States in the safeguarding of ICH.....	11
2.1.4. Objective 4: Coordination, exchange and dissemination of information regarding the safeguarding of ICH in the sub-region .....	11
2.1.5. Objective 5: Fostering regional and international cooperation for the safeguarding of ICH	12
2.2. Conformity of Activities .....	13
2.3. Contribution to C/5 .....	14
2.4. Contribution to the global development agenda .....	15
2.5. Coordination and Interaction .....	15
2.6. Quality and Relevance of Partnerships.....	16
2.7. Governance and Management.....	18
2.8. Funding.....	19
2.9. Autonomy.....	20
3. Recommendations.....	21
3.1. Recommendations for the Regional Centre.....	21

3.1.1.	Establish an explicit strategy for the Centre, in alignment with UNESCO’s general strategy (C/5) and the Global Development Agenda .....	21
3.1.2.	Set clear and ambitious goals to foster the safeguarding of ICH at the regional scale, within this strategy .....	22
3.1.3.	Strengthen outreach to NGOs and communities while capitalising on the expert network and UNESCO facilitators .....	23
3.1.4.	Formalise management procedures within the Centre .....	23
3.1.5.	Streamline communication roles and information flows both within and without the Centre.	24
3.1.6.	Provide more training and capacity building for the staff. ....	25
3.2.	Recommendations for UNESCO.....	25
4.	Annexes.....	27
4.1.	Methodology .....	27
4.2.	Interview schedules .....	29
4.3.	Interview list.....	39
4.4.	Survey results.....	42
4.5.	Travel Plan .....	47
4.6.	Renewal Evaluation Index.....	49
4.7.	Key documents consulted .....	50
4.8.	Terms of Reference .....	53

## Acronyms

ICH	Intangible Cultural Heritage
NGO	Non-governmental organisation
UN	United Nations
UNESCO	United Nations Educational Scientific and Cultural Organisation

## Executive Summary

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Aleph Strategies conducted a renewal evaluation of the Sofia Category 2 Centre. The Centre was evaluated against core criteria from the UNESCO Guidance Note on renewal evaluations. On the basis of this evaluation, we advise that UNESCO **renews the agreement** with the Bulgarian government.

Since the last evaluation, the Sofia Regional Centre has made significant progress in consolidating its position as a key partner to UNESCO and its Member States in South-eastern Europe, as well as developing its network of Intangible Cultural Heritage experts in the region. It has experienced stability in directorship and staffing, through the challenges of the Covid-19 pandemic and an uncertain political climate, and managed to carry out its core activities in spite of a limited budget. However, the Centre still has some way to go in establishing itself as a regional resource on intangible cultural heritage, which would involve setting an ambitious agenda for regional collaboration, strengthening technical capacity and developing robust management systems. Our key findings are:

- **Achievement of objectives** - The Centre has made good progress towards its five core objectives. Member States respondents were overall satisfied that the Centre promoted and helped them implement the 2003 Convention through dedicated capacity building workshops. Similarly, the Centre scores highly in enhancing the capacity of UNESCO's Member States in safeguarding Intangible Cultural Heritage (ICH), and in fostering cooperation for the safeguarding of ICH. The Centre's success towards increasing the participation of communities, groups and individuals in safeguarding ICH has been more moderate at a regional level, as most of its activities in this field have focused on Bulgaria. Finally, the Centre has made a more concerted effort to improve in key areas since the last Renewal Evaluation, such as the dissemination of information pertaining to ICH.
- **Conformity of the Centre's activities with the Agreement** - The Centre's activities conform with the Agreement: it instigated and coordinated research, organised training courses, and enhanced international, regional and sub-regional cooperation.

- **Contribution to UNESCO's C/5** - The Centre's activities are implicitly aligned with C/5 and the 2003 Convention, but strategic planning documents lack clear definitions and do not make explicit connections between activities and UNESCO's strategic objectives.
- **Contribution to the Global Development Agenda** - The Centre has contributed to Sustainable Development Goal 4 (Quality Education) and 5 (Gender Equality Agenda), but has not yet articulated its progress towards achieving those goals in a set of specific indicators.
- **Quality of coordination and interaction** - The Centre communicates regularly with UNESCO, and provides information when requested: the quality of coordination and interaction is satisfactory. However, UNESCO stakeholders both at the regional office and at Headquarters feel that the Centre should be more proactive in sharing documents, and in aligning them with UNESCO's strategy. The Category 2 Centres worldwide meet annually, but there is significant scope for increasing their collaboration.
- **Quality and relevance of partnerships** - The Centre's performance in this area is mixed, depending on the partners. The Centre maintains good relationships with the Bulgarian government agencies, has had some modest success in collaborating with international organisations, councils and associations working on ICH, but struggles to establish connection with a larger pool of donors.
- **Governance and Management** - The Centre has benefited from stable directorship and its performance is satisfactory. However, the Centre's internal management has operated informally and would benefit from greater structure to help strengthen communication with external stakeholders, implement a strategic vision and trace progress through robust Monitoring and Evaluation systems, and provide staff with training as befits their needs.
- **Funding** - The Centre receives the agreed budget from the Bulgarian government, but struggles to connect with new donors beyond Bulgarian partners. Since the renewal of the agreement (2017) the Centre has managed to mobilise about 85,000 EUR in project budget from the Bulgarian National Fund for Culture and small grants.

- **Autonomy** - In terms of decision making, the Centre has become more independent from the three Bulgarian institutions sitting on its Executive Board since the last renewal evaluation and its legal status as an NGO confers significant legal autonomy.

## Recommendations

We make the **following recommendations** for improving on the Centre's activities:

1. **Establish an explicit strategy for the Centre**, in alignment with UNESCO's general strategy (C/5) and the Global Development Agenda. The Centre needs to articulate its long-term vision, in partnership with its Member States, to help prioritise activities and define ambitious yet realistic targets.
2. **Set clear and ambitious goals** to foster the safeguarding of ICH at the regional scale, within this strategy. The Centre needs to leverage its network of National Focal Points to expand its regional reach, and focus on activities that can target bigger audiences.
3. **Strengthen outreach to NGOs and communities** while capitalising on the expert network and UNESCO facilitators. The Centre should strengthen its collaboration with UNESCO-accredited NGOs, National Focal Points, and facilitate the exchanges with ICH experts beyond Bulgaria.
4. **Formalise management procedures within the Centre**. The Centre should establish Monitoring and Evaluation processes, and reassess them periodically. It should also track its partnerships and dissemination efforts to be able to correct course if necessary.
5. **Streamline communication and information flows with external stakeholders**. The roles of National Focal Points and General Assembly representatives should be clarified, especially when it comes to communicating with them. Documents should be shared in a more proactive manner, perhaps through the use of a dedicated section of the website.
6. **Provide more training and capacity building for the staff**. In particular, staff need training in skills such as strategic planning and Monitoring and Evaluation, but also require topical updates on ICH and the global development agenda.

Furthermore, we recommend that **UNESCO further refines its standardised renewal evaluation toolkit, providing clearer definitions for good performance. The Index methodology employed in this evaluation provides a blueprint for such a toolkit**. This tool would comprise shared indicators, such as "Conformity of Activities", as well as bespoke ones that would reflect the different priorities of the Centres as well as the context in which they operate. Using such a tool would also make UNESCO's expectations regarding the performance of Category 2 Centres clearer.

# 1. Introduction

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## 1.1. Purpose of the review

Aleph Strategies was commissioned by UNESCO to conduct a renewal evaluation of the Category 2 Centre in Sofia (the Centre). This report **assesses whether the Regional Centre for the Safeguarding of the Intangible Cultural Heritage in South-Eastern Europe** situated in Sofia, Bulgaria (henceforth ‘the Centre’) **has complied with its objectives and functions** as stipulated by the agreement signed between the Bulgarian government and UNESCO in 2017. It provides an overall assessment of the Centre’s achievements and performance, and provides specific recommendations for improvement.

## 1.2. Scope of the review

The parameters of this exercise were defined by UNESCO’s Guidance Note on the Renewal Assessment procedures of Category 2 Institutes and Centres (190 EX/INF.16). In order to provide a high level, holistic review of the Centre and the way it has operated since the last renewal (2017-2022), we have used 190 EX/INF. 16 and the ToR for this evaluation to devise a **Renewal Evaluation Index** focusing on nine pillars: i) Achievement of objectives, ii) Conformity of the Centre’s activities with the Agreement, iii) Contribution to UNESCO’s C/5, iv) Contribution to the Global Development Agenda, v) Quality of coordination and interaction, vi) Quality and relevance of partnerships, vii) Governance and Management, viii) Funding, and ix) Autonomy. A simple performance score of 1-3 (1=poor, 2=satisfactory, 3=good) was employed to summarise the findings for each pillar. (further details are contained in the full methodology at the end of the report).The complete Renewal Evaluation Index is contained in a spreadsheet attached to this report. Findings here are situated, where possible and relevant, with the findings from the 2016 Renewal Evaluation report in order to illustrate direction of travel.

## 1.3. Methodology

A full methodology is provided in the annexes to this report. In brief, Aleph undertook a **desk review** of key literature provided by UNESCO and the Centre (see Bibliography). We then collected primary data during a **4-day field mission** to Bulgaria, to engage with Centre staff and national stakeholders in situ. This was complemented by online meetings. In total we conducted **26 qualitative interviews**. We also distributed an anonymous **survey** to the 17 Member States’ Focal Points, and obtained **9 responses**.

## 2. Findings

This section provides a summary of the key findings from our analysis: more details can be found in the Renewal Evaluation Index (Annexes). The table below presents the overall performance scorecard for the Centre across the nine evaluation pillars, and provides a visual guide to navigate the findings.

Table 1. Renewal Index Performance Scorecard

Pillar	Area	Score: 1=poor, 2=satisfactory, 3=good	Total
Achievement of objectives	Promotion and implementation of 2003 Convention for the Safeguarding of the Intangible Cultural Heritage	3.0	2.5
	Increasing the participation of communities, groups and individuals in safeguarding ICH	2.0	
	Enhancing the capacity of UNESCO's Member States in safeguarding ICH	2.5	
	Coordination, exchange and dissemination of information regarding the safeguarding of ICH	2.5	
	Fostering regional and international cooperation for the safeguarding of ICH	2.7	
Conformity of activities with the agreement	Instigating and coordinating research	3.0	3.0
	Organising training courses	3.0	
	Enhancing international, regional and sub-regional cooperation	3.0	
Contribution to C/5	Alignment with C/5	1.75	2.0
	Alignment with the 2003 Convention	2.3	
Contribution to the global development agenda	Alignment of the Centre's Plans with Agenda 2030 and the SDGs	2.0	2.5
	Contribution towards achieving SDGs	3.0	
Quality of coordination and interaction	With UNESCO at Headquarters	2.7	2.1
	With UNESCO field offices	2.0	
	With Category 1 and 2 institutes or centres working on Intangible Cultural Heritage	1.7	
Quality and relevance of partnerships	With Bulgarian government agencies	2.0	1.7
	With international organisations, councils and associations	2.0	
	With donors	1.0	
Governance	Efficiency of the governance arrangements	2.3	1.9
	Efficiency of Management	1.7	
	Efficiency of accountability mechanisms (including Learning, Monitoring and Evaluation)	1.3	
	Human Resources (quality of mechanisms and capacities, opportunities and risks for ensuring sustainability and viability)	2.2	



Funding	Process of mobilising extra-budgetary resources	1.3	1.6
	Alignment of extra-budgetary funding with strategic programme objectives of UNESCO (C/5)	2.0	
	Sources and efficiency (quality of mechanisms and capacities, opportunities and risks for ensuring sustainability and viability)	2.0	
	Financial Sustainability	1.0	
Autonomy	Autonomy from the government	2.0	2.5
	Legal capacity to contract, institute legal proceedings and acquire and dispose of movable and immovable property	3.0	

## 2.1. Achievement of Objectives

Data gathered through qualitative interviews and annual reporting indicates that **the Centre is making good progress towards its overall objectives**. However, the Centre lacks a Results Framework, which makes it impossible to conduct an empirical assessment of achievement against pre-defined targets.

### 2.1.1. Objective 1: Promoting and contributing to the implementation of 2003 Convention for the Safeguarding of the Intangible Cultural Heritage

Member States respondents were generally satisfied that **the Centre promoted and helped them implement the 2003 Convention** through dedicated capacity building workshops: 6 of the 9 Focal Points survey respondents felt that their knowledge of the Convention had improved. Every Member State is supposed to receive 5 training workshops on the 2003 Convention in the long-term: these are organised and allocated based on demand and availability. Facilitators are hired from the UNESCO network and their fees are covered by the Centre. The Centre cannot afford to organise more than 2 or 3 of these workshops a year, and according to the Centre's Capacity Building workshops documents, most Member States have received between 1 and 3 of these trainings between 2013 and now. While the Centre has made progress towards its objective to provide all countries with the required training, there are some omissions: due to the lengthy coordination process, a workshop has yet to be organised in Turkey or Moldova. Indeed, the organisation of workshops is a fine balance between the requests of Member States and their availability in a given year.

Evidence suggests these workshops have had tangible results. A focal point from one of the Member States explained that in a project that took place in their country between 2020 and 2021 to establish an inventory of ICH in 3 provinces, the specialists who had undertaken the training knew how to conduct an interview with a bearer of ICH, how to obtain consent following the guidelines of the Convention, and specific methods to inventory ICH practices.

2.1.2. Objective 2: Increasing the participation of communities, groups and individuals in safeguarding the intangible cultural heritage in the South-Eastern European countries

**The Centre's success in increasing the participation of communities, groups and individuals in safeguarding ICH has been more moderate.** The Centre has undertaken several initiatives to involve new partners and build networks, though the Centre has not recorded these partnerships in a systematic manner. Work is currently underway at the Centre to build a consolidated database of stakeholders. The Centre has reinforced partnerships with museums and NGOs, including for example the "Balkan Documentary Centre", with whom the Centre has worked since 2012 and managed to co-organise a 'Filming ICH' event in Belgrade (see Case Study 1 below).

**Case Study 1: Filming ICH, an international workshop in Serbia**

The Sofia Centre and the Balkan Documentary Centre collaborated to host the Filming ICH workshop in Belgrade in 2018. Its aim was to promote the work of documentary filmmakers in documenting and safeguarding ICH. Open to all ages, a dozen participants were selected and received a chance to improve their documentary projects over two days. The final documentaries were presented to a Jury and received prizes. The Centre's help was fundamental in organising and finding contacts for this event, as it leveraged its international network. The event was due to become annual but was halted by the pandemic and a lack of budget in both institutions. This workshop highlights the benefits incurred by the Centre when it mobilises its network, as well as the budgetary limits it faces in organising activities.

The Centre is also interested in expanding partnerships with schools and universities with a view to apply for Erasmus funding. The Centre has stepped-up activities catering to younger audiences since the last evaluation. A recent example is the 'Share your Heritage' competition, open to 18-35 year olds from its Member States. Its focus was on lived heritage and participants presented songs, dances, handicrafts, photos, and essays. However, there is still room for improvement as the events organised for youth only reached small audiences, according to the Living Heritage Entity.

Targeting local communities was identified as a key challenge both by the Centre staff and its main partners, and an area where significant improvement is needed. To date, the Centre has had more success in engaging local communities in Bulgaria compared to other countries in the

region, where the Centre lacks long-established institutional partnerships with museums and NGOs through which such community engagement is typically facilitated. NGO partners have commented on this in interviews, as well as anonymous Member States' Focal Points responding to Aleph's online survey.

#### 2.1.3. Objective 3: Enhance the capacity of UNESCO's South-Eastern European Member States in the safeguarding of ICH

The Centre **scores highly in enhancing the capacity of UNESCO's Member States in safeguarding ICH**. According to the Living Heritage Entity, the Centre was fundamental in helping UNESCO reach its capacity building objectives. ICH experts have valued the networking opportunities provided by the Centre, and found that these benefited their work. Every year, the Centre carries out both the Training of Trainers (UNESCO network) and a meeting of ICH experts from South-eastern Europe. The Centre started organising the yearly Training of Trainers after the last evaluation in 2017, in partnership with the Regional Bureau. In 2022 these two events were joined, which experts appreciated as it expanded networking opportunities.

#### 2.1.4. Objective 4: Coordination, exchange and dissemination of information regarding the safeguarding of ICH in the sub-region

The Centre has made a **concerted effort** to improve in key areas since the last Renewal evaluation, such as the **dissemination of information pertaining to ICH**. The Centre has worked hard to improve the visibility of ICH in the region, through promoting access to ICH information. Indeed, the Centre has been described by ICH experts as a "Hub" which collects information on ICH initiatives in 17 countries and communicates it to its partners. One recent example is an initiative they carried out during the pandemic. The 'Days of ICH' exhibition encouraged each country to represent three ICH elements in a virtual format. An interviewee explained that this helped them to explore both their uniqueness and common points with other countries of the region in terms of intangible cultural heritage.

**Media coverage of the Centre and its work has reportedly improved** since Irena Todorova became director: she was a guest on several national TV channels and media outlets. Media appearances are reported in the newsletter, and recent examples include the director's interview for national media "24chasa" in September 2020. To keep track of the mainstream media's engagement with the work of the Centre, we would recommend such instances to be systematically compiled.

#### 2.1.5. Objective 5: Fostering regional and international cooperation for the safeguarding of ICH

The Centre has also **made important strides towards fostering regional and international cooperation for the safeguarding of ICH**. The Centre has organised networking events promoting cooperation between researchers. For example, the last meeting of experts focused on ICH and education. One expert from beyond Bulgaria expressed how thankful they were to be able to connect with colleagues and discuss key issues, especially after the pandemic. ICH Experts from the region who have attended these events have pointed towards possible areas for improvement in the quality of meetings themselves. One requested that the content of the meeting of experts is sometimes too basic and should acknowledge the shared ICH background of its participants. Another person has explained that they would like to see the Centre taking a stance by expressing its vision for safeguarding ICH growing from the regional collaboration, as well as outlining solutions to key shared challenges. However, the last meeting of experts lacked such clear positioning.

We find evidence to suggest that **the Centre has been active in promoting and supplementing ICH inventories**. While there is little information to assess whether this has been done systematically, there are discrete examples that showcase this work. In Albania, the Centre organised a workshop on Community-based ICH inventorying. In Bulgaria, the Centre helped the National Centre for ICH establish contact with *Chitalishtes* (community cultural centres present in most towns and villages of Bulgaria) to support their effort in keeping local archives.

The Centre's **dissemination efforts have increased since the last renewal evaluation**. It publishes its own journal, 'Living Heritage', with an issue coming out every year since 2018 (see Case Study 2 below). The Living Heritage Journal is in English and distributed regionally, with the latest issues broaching topics of international relevance such as the safeguarding of intangible cultural heritage at risk in Ukraine (2022, issue 7-8). The Centre also shares information on its Facebook page, which has over 2,800 followers as of November 2022, and a Youtube channel opened in 2019 on which it disseminates videos about ICH. The Centre's own website also contains some information on ICH practices in its Member States, but it has been criticised by several interviewees for being rarely updated and containing little information on upcoming events.

### Case Study 2: the Living Heritage journal

The Living Heritage journal was an initiative launched in 2018, and coincided with the Centre's striving to engage more with ICH experts across the region. The journal contains academic articles and interview pieces featuring Member States representatives, ICH experts and other Category 2 Centres. It is published in Bulgarian and English and distributed online and regionally, with printed copies distributed to the Member States and key partners. The latest issues have attempted to broach topics of international relevance such as the safeguarding of intangible cultural heritage at risk in Ukraine (2022, issue 7-8). However, this publication requires significant efforts, as the annual budget contributing to its elaboration is worth 7666 Euros; in 2020, for instance, 12,700 Euros were spent. The readership is modest, as the last issue published in November 2022 was downloaded 115 times between publication and the time of this evaluation (2 weeks). Online data from Facebook shows that a post about the LH Journal reached 910 in one month, achieving 79 interactions. While the journal is a good initiative, it raises the question whether this is the most cost-efficient way of engaging with audiences.

## 2.2. Conformity of Activities

The Centre **performed well** in this area, as the Centre **delivered activities in conformity with its contractual obligations**, which are to instigate and coordinate research, organise training courses and conduct activities aiming at enhancing international, regional and sub-regional cooperation.

The Centre has **instigated and coordinated research**, with a recent example being the 2021 Scientific conference on 'Local communities, cultural heritages and museums'. ICH researchers in Bulgaria and beyond have asserted that the activities of the Centre have helped them meet colleagues and share ideas on a more regular basis.

The Centre has also successfully **organised training courses**. The Centre has conducted at least two UNESCO Capacity building workshops annually, a needs assessment, and one Training of Trainers for the European chapter of the global facilitators' network (in partnership with the UNESCO Living Heritage entity). As a recent example, in 2021 the Centre organised two online events aimed at building capacity at the regional level: a training event dedicated to the Periodic Reporting as a Strategic Tool for safeguarding Living Heritage in South-East Europe, and UNESCO's regional training for Country Focal Points on periodic reporting.

The Centre has **conducted activities aiming at enhancing international, regional and sub-regional cooperation**: for example, it has convened a meeting of the South-East European Experts Network on Intangible Cultural Heritage (ICH) on an annual basis. At the international level, the Centre has also exchanged with other Category 2 Centres working on ICH, and they meet annually to discuss ideas and strategies. This year's meeting will be held in Bulgaria.

### 2.3. Contribution to C/5

The Centre's activities are implicitly aligned with C/5 and the 2003 Convention, but strategic planning documents lack clear definitions and do not make explicit connections between activities and UNESCO's strategic objectives.

**The Centre is certainly using C/5 to plan activities, but UNESCO stakeholders would like to see C/5 objectives integrated more explicitly into the Centre's strategic planning and literature.** The long-term programme (2017-2021) of the Centre explicitly mentions UNESCO's MLA 2 (following 38/C5) as the key priority and according to the Staff centre, it informs its disaggregation into objectives and activities. However, the Expected Results and UNESCO performance indicators are not systematically included in the Centre's strategic documents and annual plans and efforts to integrate C/5 have been inconsistent. An example of this can be found in the annual workplan of activities. While the annual workplan for 2014 aligned with 37 C/5's expected results following guidance from UNESCO, the next few years saw a gradual return to a linear description of activities. The 2020 and 2021 work plans made significant progress in mentioning C/5's ERs and objectives as headings under which the activities are described, but this again was not explicit for the 2022 work plan. The Centre has not systematised its approach to preparing a work plan following C/5, which also creates additional work every year.

**Similarly, the Centre's activities also contribute to most of the core indicators of the 2003 Convention's Results Based Framework, but do not explicitly articulate these indicators in their reporting documents.** Through their organisation of training courses on the Convention and its operational directives, delivered to relevant ICH institutions, as well as the organisation of workshops and conferences to ICH specialists, the activities of the Centre actively contribute to the three core Institutional and Human Capacities indicators of the Convention. Through their delivery of training workshops and conferences at museums, universities, NGOs and governmental institutions, the Centre is contributing to objectives (4) and (6) of the Convention's

Transmission and Education Indicators, and in particular through non-formal education. The Centre is not yet very active in primary and secondary education (objective 5), as their engagement with children has been limited to museums or ad hoc exhibitions. Addressing C/5 and the Convention's indicators more systematically would help the Centre ensure that they follow UNESCO's strategic direction, and prioritise activities accordingly.

## 2.4. Contribution to the global development agenda

The Centre's activities **implicitly contribute to the Sustainable Development Goals**, and in particular to the Gender Equality Agenda (SDG 5) and Quality Education (SDG 4). It also plans to serve further SDGs in the future, such as Sustainable Cities and Communities (SDG 11) and Climate Change mitigation (SDG 13), though staff would require further training. Despite this alignment, the global development agenda is not mentioned in the Centre's strategic documents, and the Centre does not measure its contribution against relevant indicators within the SDG framework. This can be partly explained by the fact the Sustainable Development Goals were set up in 2015, which means they were not yet part of the official UNESCO C/5 strategy at the beginning of the period covered by this evaluation. Nevertheless, we recommend that in their future strategy, the Centre makes their contribution more explicit with SDG-related progress indicators.

## 2.5. Coordination and Interaction

**The Centre communicates regularly with UNESCO, and provides information when requested: the quality of coordination and interaction is satisfactory.** However, UNESCO stakeholders both at the regional office and at Headquarters feel that the Centre should be more proactive in sharing annual workplans, reports and budgets, and in aligning them with UNESCO's strategy.

ICH representatives at country level<sup>1</sup> experience **mixed levels of communication and coordination with the Centre**. This group of stakeholders comprises representatives to the Member States in the Centre's General Assembly and the National Focal Points<sup>2</sup>. **Representatives in the General Assembly** have an observer role and can vote at the General Assembly, but seem to have **limited**

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<sup>1</sup> UNESCO's Guidance Note on the Renewal Assessment procedures of category 2 Institutes and Centres focused specifically on UNESCO stakeholders for this pillar, including UNESCO National Commissions. However, we have found that UNESCO National Commissions only cooperate with the Centre when they are National Focal Points or General Assembly members, hence our decision to focus on these stakeholders instead to assess the quality of coordination and interaction with regards to planning and implementing programmes.

<sup>2</sup> Representatives to the Member States in the General Assembly may be ICH experts, representatives from their country's National Commission for UNESCO, or working in their country's Ministry of Culture. Meanwhile, the National Focal Points are either members of the national Ministries of Culture, or of the UNESCO National Commissions.

**communication** with the Centre beyond that. One interviewee stated that the Centre should leverage its network and consult more frequently with the General Assembly members when devising the annual workplan. Centre staff have also expressed difficulty getting in touch with some of the Member States, who do not always respond to communication requests in a timely manner, resulting in a narrow pool of 5-6 Member States who are actively involved and engaged on a regular basis.

The addition of the National Focal Points in 2019 **was an attempt to strengthen the representation of the Centre at country level and** help Member States with the implementation of the Convention; but similar to General Assembly members, levels of responsiveness and engagement with National Focal Points vary considerably. While they play a key role in liaising between the centre and the Member States, there are discrepancies in their status, as not all of them have a seat at the General Assembly, or the ability to vote on the Centre's planned activities, and some of them undertake the role of Focal Point on a voluntary basis in their own spare time. This can create a disparity of engagement. The UNESCO Living Heritage Entity stated that the network of Focal Points needs to be strengthened. The roles of National Focal Points sometimes overlap, as is the case in Serbia or Croatia, and this can create confusion for sharing information. One Focal Point explained that documentation from the Centre that they should have received was delayed because it had gone instead to the General Assembly member from that country.

The Centre **maintains regular communication with the other Category 2 Centres** through their annual meeting, and frequently features interviews showcasing their work in the Living Heritage Journal. However, the Sofia centre would be eager to foment a stronger association so that the Centres can learn from each other and collaborate on projects. For example, CRESPIAL stated that the Sofia Centre is unique in the flexibility given by their NGO status, and that their cooperation with experts could be an example for other Centres. Meanwhile, the Sofia Centre could learn from CRESPIAL how to foster stronger collaborations at the country level to present international projects. Learning from the Covid-19 pandemic, it would be possible to instigate more regular online meetings, but none of the Centres have taken the lead on organising such events.

## 2.6. Quality and Relevance of Partnerships

The Centre's performance in this area is **mixed, depending on the partners**. The Centre maintains **good relationships with the Bulgarian government agencies**, has had some **modest success in**



**collaborating with international organisations**, councils and associations working on ICH, but **struggles to establish connection with a larger pool of donors**.

The Centre has **maintained good relationships** with its three main Bulgarian stakeholders, two of which are related to the government. The Ministry of Culture and Ministry of Foreign Affairs have unambiguously expressed their support of the Centre and their desire to continue working with it. **Communication between the Centre and Bulgarian government is generally good**, taking place on a regular and informal basis. However, there is **appetite for stronger formal lines of communication** and information sharing. Communication currently takes place mainly by phone on an ad hoc basis when information is requested, as explained by stakeholders from the Ministry of Culture and Ministry of Foreign Affairs. Communication would be better served by the use of more formal channels. For example, the Centre's annual workplan and annual report could be accessible on their website, behind a password protected section that members of the Executive Board could access.

**The Centre's engagement with international organisations, councils and associations has been solid in Bulgaria but weak in other countries**. The Centre has **mainly collaborated with Bulgarian NGOs**, as they have a solid track record with key institutional partners. Several collaborations have been instigated, for example with the NGO Balkan Documentaries, to coordinate international film festivals on ICH (Belgrade, 2018).

However, all stakeholders agreed that the Centre **struggles to reach stakeholders outside of Bulgaria**. Language was mentioned as one of the main obstacles encountered in engaging with NGOs and communities beyond Bulgaria. The UNESCO-accredited NGOs are English-speaking and have an international outlook, but they are currently an untapped asset with whom the Centre should collaborate more. A General Assembly member partnering with 7 UNESCO accredited NGOs mentioned that in their country, these NGOs are not in touch with the Centre at all. That person perceives these NGOs as a key bridge to help the Centre reach local communities. Stakeholders within UNESCO and the ICH expert network also feel that the Centre could leverage its network of international Focal Points and UNESCO facilitators to engage more strongly with NGOs and communities beyond Bulgaria. A museum specialist from beyond Bulgaria mentioned that the Centre could engage directly with a pool of ICH experts, museums and NGOs, and create a database of contacts that it can draw from without going through the Focal Points. However, there is a fine balance to be struck between strengthening a regional network and trying to involve

partners at the local level. Engaging with NGOs across 17 countries is a daunting task for a staff of six, hence the necessity for the Centre to mobilise its Focal Point and UNESCO partners.

The **Centre maintains a narrow group of relationships with potential funders**, but struggles to obtain funding for activities with an international reach. This is due partly to gaps in capacity and partly to the fact that the Centre is perceived as engaging primarily with Ministry level institutions rather than communities. The Centre has applied for funding from the European Union, but as of yet has been unsuccessful. UNESCO stakeholders from Headquarters and at the regional level mentioned that they could provide support in writing funding applications, but have not been approached in that capacity. At the National level the Centre has obtained funding from the Culture Fund, a donor who operates in tandem with the Ministry of Culture but is autonomous from it. They were successful twice, and are applying for the Culture Fund's cultural development programme.

## 2.7. Governance and Management

Since the last evaluation, **significant improvement** was achieved in the governance of the Centre, which has benefited from stable directorship. However, the Centre's **internal management is informal and would benefit from greater structure**.

The **Executive Board and General Assembly perform a satisfactory role in the governance** of the Centre, though we find **scope to improve representation from the Centre's Member States**. Although Member States can express their opinion through their vote, the General Assembly does not provide much room for in-depth discussion and negotiation. At the moment, the General Assembly comes too soon after the draft of the annual workplan has been circulated for the Member States to have any significant say in the planned activities. Other Category 2 Centres have also successfully included the views of their Member States to define their strategic direction, by engaging in a more consultative process with them to draft mid-term strategic documents.

We found **significant gaps in the management** of the Centre, which has grown organically over time and **lacks rigorous structures**:

- The Centre does not have a strong Monitoring and Evaluation system in place. The Annual report is the main mechanism for reporting (UNESCO 40 C document on the strategy for Category 2 Centres). The Centre has not yet implemented a Results Framework, but staff

at the Centre recently received training to implement such an approach. Without such a framework, the Centre is likely to struggle to know how to prioritise activities following UNESCO's Results Based Framework, and allocate budget accordingly.

- Key positions are poorly defined, resulting in blurred lines of communication with external stakeholders. For example, a UNESCO regional stakeholder was confused about whom to approach for his queries at the Centre as the roles kept changing.
- There is no framework for professional development or skills development within the Centre. Staff members have benefited from the Results Based workshop organised by their colleague in the Venice Regional Bureau, and expressed their eagerness to receive further training in skills that would help them professionally. These include strategic planning, communication and how to build up their network, monitoring results and understanding long-term outcomes from activities. They would like UNESCO to give them further training on the expectations they have regarding Category 2 Centres, notably in terms of communication and strategic vision.

## 2.8. Funding

The Centre **spends all the budget** allocated by the Ministry of Culture to conduct activities, but **struggles to mobilise extrabudgetary resources**. These would be particularly important in helping the Centre expand its activities and organise more capacity building workshops in the countries of the region.

**The Bulgarian government fulfils its contractual obligations** and the Centre receives the equivalent of 200,000 euros a year. However, Centre staff deem this **a low budget** considering the costs of employing six full time staff members and the scope of activities the Centre is mandated to undertake. The budget has indeed limited progress on the five planned capacity building workshops per country to two or three per year. Since the Centre's implementation, the budget has not increased, and it is the smallest of all Category 2 Centres. The director of the Centre, and UNESCO partners have commented that the wages are low for the work carried out by the staff. The Director expressed concern that she might not be able to retain her staff if she cannot align their wages with the rising cost of living. While the Financial, Administrative and Human Relations Management rules of the Centre stipulates that it may raise funds from an annual membership fee, this has not been implemented, and there is significant resistance from the Member States to the introduction of such a fee structure.

The Centre has had **moderate success applying for funding from Bulgarian institutions** such as the National Fund for Culture, from which they obtained 40,000 euros to implement a project focusing on Bulgarian traditional cuisine. The issue is that national projects usually fail to reach audiences beyond the borders and the Centre needs to be careful to translate outputs into English to facilitate the exchange of ideas and practices with their regional partners.

**Applying for international funding is more challenging**, and several sources are not available due to the nature of the Centre, which constrains its eligibility for certain calls. These include the UNESCO International Assistance Fund (restricted to Lower- and Middle-Income countries); the Bulgarian Ministry of Culture's funds (as its stakeholders sit on the Executive Board of the Centre, that would be perceived as a conflict of interest), or any research partnerships for which more than 20% of the funding needs to be provided by the host institution.

While the **revenue of the Centre is an area of concern, there are ways to maximise what can be achieved with a limited budget**. UNESCO, both at the regional bureau and headquarters level, have observed that the Centre spends a significant portion of their budget on activities that only benefit a limited audience, such as carrying out an exhibition in a local museum. They would like to see more funds devoted to training and coordinating networks, which would increase the reach of the Centre and the impact of its activities.

## 2.9. Autonomy

The Centre operates with a good level of autonomy both from UNESCO and the Bulgarian Government. The three Bulgarian entities that participate in the Executive Board hold significant influence over the decisions of the Centre, but in recent years **the Centre's ability to maintain a balance and establish their independence has improved**. Centre staff have said that ministry representatives often try to sway the Centre closer to its own objectives, which has generated frustration for the staff. This is also visible to non-Bulgarian general assembly members, who can perceive the weight of the Bulgarian institutions. As these can implement policy, they hold significantly more power than the other General Assembly members, whose main, and limited, mechanism for expressing opinions is their vote.

However, interviews with general assembly members suggest that the Centre has generally been successful in **maintaining a balance** between fulfilling their agreement with all stakeholders.

Indeed, UNESCO representatives have admired the Centre's diplomatic skills and political neutrality.

The Centre **benefits from significant legal autonomy** following the Agreement between the Bulgarian government and UNESCO. It is a non-governmental association registered in Bulgaria and publicly funded by the Bulgarian Government, and this status confers them with significant autonomy in comparison with the other Centres such as the ones in Japan or Iran, who are under direct state supervision, or CRESPIAL in Latin America which has a hybrid status. They have legal capacity to contract and regularly hire facilitators, design makers and exhibition specialists on a project basis. The Centre can institute legal proceedings and acquire and dispose of property in accordance with Bulgarian Law.

### 3. Recommendations

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Following the evaluation process and the analysis outlined above, we recommend that **the Agreement between UNESCO and the Bulgarian government should be renewed**. The stakeholders we spoke to **unanimously supported the renewal**. However, they made several suggestions for improvement, which we add to our own and discuss here.

#### 3.1. Recommendations for the Regional Centre

##### 3.1.1. Establish an explicit strategy for the Centre, in alignment with UNESCO's general strategy (C/5) and the Global Development Agenda

While the Centre is in alignment with C/5 and the Global Development Agenda, we recommend that it **articulates a long-term and mid-term vision, adapted to the UNESCO quadrennial programme**. This strategy should be accompanied by a rigorous MEL framework that should be tied to **specific objectives, outcomes and outputs** following UNESCO's Results Framework. This would help the Centre assess its main priorities for the next year and identify areas of weakness that need to be addressed and reinforced. In drafting such a strategy, we encourage the Centre to conduct a workshop gathering the expectations and suggestions of all Member States to ensure it can adequately fulfil their needs in the long-term.

A strategy would also help the Centre **consolidate its role and identity** independently of the Bulgarian entities that have sometimes steered its direction in the past. From the UNESCO Headquarters' point of view, such a vision would need to come from the Centre itself: all Category

2 Centres have developed a distinct profile, and the Sofia Centre should define its identity and operate more autonomously.

### 3.1.2. Set clear and ambitious goals to foster the safeguarding of ICH at the regional scale, within this strategy

The Centre is currently focusing on providing logistical support in organising events and training workshops for ICH experts and member states. Regional experts have said that they would like to see the Centre **take on a more proactive role in setting a regional agenda** for future collaborations in the field of ICH, shaping regional dialogue, targeting key challenges across the region, and for staff to share their insights about ICH in the meetings they organise to provide a more holistic regional perspective. This can be achieved by more regular consultations with General Assembly members, either online or by survey format, to ensure that the Centre can understand and address the key issues that Member States are encountering nationally, and acquire a broader perspective. Similarly, the regional representativity of the Centre can be improved by giving Member States more time and opportunities prior to the General Assembly to provide their feedback on the annual plan of activities and strategy.

We concur with the Living Heritage Entity that the main priorities for the Centre are to focus on capacity building and increase the audience reach for awareness raising initiatives. **Activities that can target a broader audience (online, international)** should be favoured over small-scale, local activities that are hyper-specialised. This goes hand in hand with enhancing cooperation with the regional network of experts in ICH, as well as the UNESCO-accredited NGOs which have international reach.

**The National Focal Points** should also **be mobilised to help tailor the activities to the local context** and help the Centre find its unique selling point, and strategic focus. For example, the training provided to the facilitators on safeguarding ICH mainly uses examples from other continents, and participants have stated that they would appreciate the Centre using their network to update the curriculum and make it more relevant at the local and regional levels. The Centre can also facilitate a regular meeting of National Focal Points where they can exchange ideas and set a vision for how the Centre can help safeguard ICH in all their countries and at the regional level.

### 3.1.3. Strengthen outreach to NGOs and communities while capitalising on the expert network and UNESCO facilitators

Engaging with communities is a key challenge for the Centre, and is currently dependent on the Focal Points' availability. While it is difficult for the Centre to target a constellation of NGOs at the international level with their limited capacity, there are several ways to increase reach. The **Focal Point network can be strengthened**, for example, with regular meetings and an assessment of possibilities for liaising with NGOs at the national level.

NGOs are a key transmitter and supporter of ICH to local communities, and while the Centre engages with Bulgarian NGOs, it **should also target the English-speaking UNESCO-accredited NGOs more consistently**. These can act as a hub connecting the Centre to other NGO partners and local communities in their home countries. The Centre is planning to strengthen cooperation with the UNESCO-accredited NGOs in the future, under UNESCO's guidance, and we recommend they make this a priority.

The Centre should also establish a **platform of voluntary ICH experts** who can liaise with the Focal Points and be the 'bridge' between the local communities, NGOs and the Centre itself. This could take the shape of a dedicated forum section of the website where NGOs, ICH experts and Focal Points can exchange information and contact details, as well as recommendations and advice. A significant number of experts have pointed out their willingness to voluntarily help the Centre expand its reach with NGOs and local communities, as this would strengthen their own work and promote the safeguarding of ICH in a more bottom-up and less politicised manner.

### 3.1.4. Formalise management procedures within the Centre

The Centre should **establish Monitoring and Evaluation systems, and review and update them regularly** in alignment with the changes in guidance within UNESCO, the 2003 Convention and the global development agenda, as well as ensure that the Monitoring and Evaluation tools are fulfilling their needs. They should draft a Theory of Change for the Centre, and a Results Framework with indicators derived from C/5 and the 2003 Convention. This would enable the Centre to pursue its strategic ambitions systematically, monitoring progress and report on wider impacts. It would also create strong evidence base for communications and policy work, and for fund-raising.

Staff performance should be **assessed regularly to suggest possible areas for improvement and to provide a framework for career progression**. There are no formal mechanisms for reflecting on

gaps in capacity, and training has been infrequent, with only one workshop organised in October 2022. This evaluation has highlighted significant appetite within the Centre for building skills, and a number of areas in which training would be beneficial, including strategic planning, monitoring and evaluation.

The Centre **should strengthen data management practices**. There is currently no database of partners and no communications database, which means that the Centre engages with stakeholders and beneficiaries in an informal manner and only has lists of contacts for each specific project. This is a weakness as an informal system is prone to human error, which would result in key partners being overlooked. Having a formalised database of contacts and partners would also help the Centre identify key gaps and demonstrate an increase of partnerships to its donors and to UNESCO.

Similarly, media and dissemination efforts are not tracked, such as the number of publications downloaded from the website, or page views. **The Centre should conduct regular media monitoring** in order to inform audience outreach and penetration, and in order to inform future potential outreach activities.

#### 3.1.5. Streamline communication and information flows with external stakeholders

Currently, requests for information often pass through several people before they reach the right recipient. The Centre should **clarify the communication roles for different stakeholders**, as there is currently confusion regarding the responsibilities of National Focal Points, General Assembly members, and UNESCO National Commissions, which sometimes overlap. This should involve drafting a clear policy explaining which documents must be shared with whom, and at which moments of the annual cycle, with formal mailing lists.

The Centre's **communication and information sharing process with Bulgarian and international stakeholders could be streamlined and formalised**. Several stakeholders, including UNESCO's Regional Bureau and the National Commission in Bulgaria have explained that they do not systematically receive documents such as the final version of the annual report. The Centre's website could include a password-protected section containing a repository of key documents (annual workplans, annual reports, strategy, budget), to guarantee access to members of the general assembly. An online repository would also facilitate the transition of information when newly appointed members of the government join the Executive Board or the General Assembly.



### 3.1.6. Provide more training and capacity building for the staff.

The first step would be to conduct a **capacity gap assessment** to identify training needs. This could take the form of an Action Learning Workshop where the staff would reflect on their weaknesses and priorities for training and capacity enhancement in the future. On the basis of our evaluation, we find a number of areas where training could be provided, or where a mentorship scheme might help fill gaps in capacity. These include:

- **Strategic planning and vision setting.** The purpose of the training would be to help the Centre identify regional ICH needs, and align its resources with activities that could address those needs.
- **Monitoring, Evaluation and Learning** training.
- **Resource mobilisation.** This includes further training on how to apply for grants, and mentoring in submitting bids to European funders, which UNESCO could help provide.
- **Operationalising C/5.** Building on the Results Based Management training the Centre staff received, another training session could focus specifically on how to articulate C/5 related indicators and objectives to draft the annual workplans.
- **Integrating ICH with the wider global development agenda.** In particular, staff have mentioned their interest in the Sustainable Development Goals, including the role played by ICH in building sustainable communities and helping them mitigate climate change.
- Learning from **good practices in UNESCO-funded projects** across the region.

## 3.2. Recommendations for UNESCO

Though the focus of this evaluation is the Category 2 Centre in Sofia, our observations and analysis highlight a number of suggestions for UNESCO.

**UNESCO should consider refining its standardised renewal evaluation toolkit, providing clearer definitions for good performance. The Index methodology employed in this evaluation provides a blueprint for such a toolkit.**

It is commendable that the current renewal guidance note provides great latitude for the diverse structures and activities of the Category 2 Centres, but there is scope to tighten definitions and expectations, leading to a more robust evaluative framework for systematically assessing performance, justifying Agreement renewals, and comparing results across centres.

The existing guidance can be vague: for example, it provides no specific indication concerning what aspects of governance or management UNESCO wants to investigate. The guidance can also be ambiguous as it recommends to analyse the quality of collaboration with UNESCO National Commissions, who are usually not engaging with the Sofia Centre unless they are also National Focal Points or representatives in the General Assembly. Other fundamental stakeholders, such as the UNESCO network of facilitators or the UNESCO accredited NGOs, were not mentioned in the guidance which means that we only included them later in our analysis. This results in reports differing vastly in terms of their quality and level of insight: take into consideration, for example, the depth of information contained in the latest CRESPIAL evaluation and the lack of detail contained in the 2016 Sofia evaluation.

We would recommend the creation of a **dedicated renewal evaluation toolkit** to make UNESCO's expectations regarding the performance standards of Category 2 Centre explicit, and systematize the evaluation process across all Category 2 Centres. This toolkit could guide the Results Framework in use in each centre and make sure they conform to key shared indicators. The toolkit would also allow for bespoke indicators taking into account the regional context in which each Centre operates.

In addition to this, UNESCO should also consider providing a **template for the annual workplans with explicit indicators**, which would help the Centres clarify their strategic objectives in relation to C/5.

UNESCO could also provide **onboarding documents or training**, making their expectations clear regarding the strategic directions that Category 2 Centres should undertake. UNESCO could be more explicit about what they expect from the Centres, in particular in terms of autonomy and developing a vision. Currently the guidance only provides broad objectives that can be subject to interpretation, and Category 2 Centres differ in how much they conform to UNESCO's expectations in terms of regional reach, capacity building or the creation of research networks.

## 4. Annexes

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### 4.1. Methodology

For this evaluation, we used a bespoke **Renewal Evaluation Index** (attached to this report as an Excel Document, Annex 4.6). We based our analysis on the nine pillars that guided this report: i) Achievement of objectives, ii) Conformity of the Centre's activities with the Agreement, iii) Contribution to UNESCO's C/5, iv) Contribution to the Global Development Agenda, v) Quality of coordination and interaction, vi) Quality and relevance of partnerships, vii) Governance and Management, viii) Funding, and ix) Autonomy.

Each Pillar is broken down into a series of **Areas** that correspond to measures of success for that pillar. The Areas themselves are further broken into **Indicators**, which are scored on a scale of 1-3, 1=poor, 2=satisfactory and 3=good to facilitate analysis. The aggregate indicator scores provide a score for the Area, which in turn creates an aggregated score for the Pillar. The scoring system was designed to easily highlight areas in which the Centre is performing well, and areas in which it can improve. For each of these indicators, a '**desired state**' describes the ideal scenario. For example, in *Fundraising*, the desired state reads as follows: *"The Centre is able to mobilise funds to overcome funding gaps from voluntary additional contributions, subsidies, grants and donations"*.

To define the indicators, we have primarily used UNESCO's Guidance Note on the Renewal Assessment Procedures of Category 2 Institutes and Centres. For Area 1, *Achievement of Objectives*, we have been guided by the outcomes defined in the Centre's Strategy<sup>3</sup> in the absence of a dedicated Results Framework.

Our analysis was based on data triangulated from the interviews, surveys, case studies, literature and our field visit to the centre. This analysis will focus on assessing the extent to which the desired state has been reached.

The collection of data to populate the Index took place both remotely and in person in Sofia, over a period of three weeks. Our remote data collection methods included qualitative interviews, a survey of Member States Focal Points, and the further review of relevant documents.

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<sup>3</sup> Sofia Centre (2017) Long-Term Programme 2017-2021. General Assembly, 16 May 2017, Sofia.

The **field visit** facilitated the interview process with Bulgarian stakeholders, enabled us to observe the Centre's achievements and functioning in situ, and focus on a couple of case studies showcasing lessons learned. The travel plan can be found in Annex 4.5.

Aleph **interviewed a range of stakeholders** online and in-person across the Centre's stakeholder universe (see list in Annex 4.3). These included the Centre's staff, UNESCO staff (both at Headquarters, at the Venice Regional Bureau and its antenna in Sarajevo), members of the Centre's General Assembly, ICH representatives in Bulgaria, Member States Focal Points, as well as beneficiaries. These interviews also enabled us to showcase the two **case studies** presented in the results of the report. The questionnaires we used for the interviews can be found in Annex 4.2.

We also sent an **online survey** to ICH representatives from the 17 Member States, who have participated in the Centre's General Assembly and liaise at the national level. The purpose of this survey was to obtain an overall view of the engagement of the Centre with its Member states, and provide an opportunity for anonymous feedback. The survey was elaborated and disseminated on Google Docs, and we received nine answers, attached in Annex 4.4.

In conjunction with the interviews and survey, we also reviewed relevant literature from the Centre, UNESCO and other organisations working in the sector. This implied an in-depth analysis of the Centre's Annual Reports, Financial reports and annual work plans, as well as publications from the Centre. A full list of documents consulted can be found in Annex 4.7.

This visit will enable us to focus on two case studies, which will be integrated in our final report to showcase practical examples of the Centre's activities, their engagement with beneficiaries, and lessons learnt. The case studies will be chosen in coordination with the Centre over the next week. The table below illustrates a number of potential selection criteria.

## 4.2. Interview schedules

<b>Stakeholder Group</b>	<b>UNESCO Headquarters</b>
<b>Participants</b>	
<b>Date</b>	

INTRO: Thank you for finding the time to speak to me today. As you know, Aleph has been commissioned by UNESCO to undertake a renewal evaluation of the Regional Centre. As part of this work, we're speaking to a broad range of stakeholders working on Intangible Cultural Heritage.

### Topic 1: Background

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#### 1. In what capacity have you engaged with the Centre and its work?

*Probe: To what extent are you aware of the Centre's activities? To what extent do you feel UNESCO contributes, or has a say in these activities? To what extent does UNESCO help the Centre, and what is the nature of that help?*

### Topic 2: Communication

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#### 2. How would you characterise your communication with the Centre?

*Probe: How do you communicate? Email, online meetings? Has anything changed since 2017, and have there been any positive or negative changes? How satisfied are you with the degree of communication? Is the information provided by the Centre generally relevant, accurate and useful? Is the Centre responsive to requests for information?*

### Topic 3: Fulfilling expectations

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#### 3. What are your expectations regarding the role of the Centre?

#### 4. To what extent does the Centre help your work and activities ?

*Probe: How would you define the Centre's objectives? To what extent do you feel they fulfil them? How do they fulfil them? Would you change anything with your engagement with the Centre? What would you expect from the Centre in the future?*

#### 5. To what extent do you feel the Centre contributes to UNESCO's strategy?

*Probe: To what extent do you feel the Centre contributes to knowledge about ICH? To what extent does it contribute to the Global Development Agenda?*

#### 6. What are your expectations regarding the reporting/ accountability mechanisms of the Centre?

*Probe: To what extent are you satisfied with the MEL data the Centre provide? What would you change? Do you have examples of the Centre making operational changes due to feedback on their reporting? Do you have examples of the Centre making operational changes due to communication with UNESCO?*

<b>Stakeholder Group</b>	UNESCO Field Offices
<b>Participants</b>	
<b>Date</b>	

INTRO: Thank you for finding the time to speak to me today. As you know, Aleph has been commissioned by UNESCO to undertake a renewal evaluation of the Regional Centre. As part of this work, we're speaking to a broad range of stakeholders working on Intangible Cultural Heritage.

### **Topic 1: Background**

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#### **1. In what capacity have you engaged with the Centre and its work?**

*Probe: To what extent are you aware of the Centre's activities? To what extent do you feel the Field Office contributes, or has a say in these activities? To what extent does the Field Office help the Centre, and what is the nature of that help?*

*What is the nature of your collaboration with the Centre? What activities do you carry out together?*

### **Topic 2: Communication**

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#### **2. How would you characterise your communication with the Centre?**

*Probe: How do you communicate? Email, online meetings? Has anything changed since 2017, and have there been any positive or negative changes? How satisfied are you with the degree of communication? Is the information provided by the Centre generally relevant, accurate and useful? Is the Centre responsive to requests for information?*

### **Topic 3: Fulfilling expectations**

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#### **3. What are your expectations regarding the role of the Centre?**

#### **4. To what extent does the Centre help your work and activities ?**

*Probe: How would you define the Centre's objectives? To what extent do you feel they fulfil them? How do they fulfil them? Would you change anything with your engagement with the Centre? What would you expect from the Centre in the future?*

#### **5. To what extent do you feel the Centre is representative of the diversity of Intangible Cultural Heritage across the region?**

*Probe: To what extent are all countries equally represented? How is that manifested in the Centre's activities? What is missing in representation? What other activities, if any, should the Centre perform to improve the regional balance?*

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<b>Stakeholder Group</b>	UNESCO National Commissions in South-Eastern Europe
<b>Participants</b>	
<b>Date</b>	

INTRO: Thank you for finding the time to speak to me today. As you know, Aleph has been commissioned by UNESCO to undertake a renewal evaluation of the Regional Centre. As part of this work, we're speaking to a broad range of stakeholders working on Intangible Cultural Heritage.

### Topic 1: Background

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#### 1. In what capacity have you engaged with the Centre and its work?

*Probe: To what extent are you aware of the Centre's activities? To what extent do you collaborate with the Centre on these activities?*

### Topic 2: Communication

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#### 2. How would you characterise your communication with the Centre?

*Probe: How do you communicate? Email, online meetings? Has anything changed since 2017, and have there been any positive or negative changes? How satisfied are you with the degree of communication? Is the information provided by the Centre generally relevant, accurate and useful? Is the Centre responsive to requests for information?*

### Topic 3: Fulfilling expectations

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#### 3. What are your expectations regarding the role of the Centre?

#### 4. To what extent does the Centre help your work and activities?

*Probe: How would you define the Centre's objectives? To what extent do you feel they fulfil them? How do they fulfil them?*

*Would you change anything with your engagement with the Centre? What would you expect from the Centre in the future?*

#### 5. How sustainable do you find the activities of the Centre at the level of your country? What is their impact in the long-term?

*To what extent have Member States and other organisations planned and budgeted for activities previously funded by the Centre?*

#### 6. To what extent do you feel the Centre is representative of the diversity of Intangible Cultural Heritage across the region?

*Probe: To what extent are all countries equally represented? How is that manifested in the Centre's activities? What is missing in representation? What other activities, if any, should the Centre perform to improve the regional balance?*

<b>Stakeholder Group</b>	Other Category 1 and 2 institutes and centres
<b>Participants</b>	
<b>Date</b>	

INTRO: Thank you for finding the time to speak to me today. As you know, Aleph has been commissioned by UNESCO to undertake a renewal evaluation of the Regional Centre. As part of this work, we're speaking to a broad range of stakeholders working on Intangible Cultural Heritage.

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### Topic 1: Background

#### 1. In what capacity have you engaged with the Centre and its work?

*Probe: To what extent are you aware of the Centre's activities? To what extent do you collaborate with the Centre on these activities?*

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### Topic 2: Communication and Collaboration

#### 2. How would you characterise your communication with the Centre?

*Probe: How do you communicate? Email, online meetings? Has anything changed since 2017, and have there been any positive or negative changes? How satisfied are you with the degree of communication? Is the information provided by the Centre generally relevant, accurate and useful? Is the Centre responsive to requests for information?*

#### 3. Can you tell us about the occasions where all Centres gather?

*Probe: How often do you have joint events with the Centre? Can you tell us about the occasions where all Centres gather? How useful are these events to your organisation? How involved is the Sofia Centre?*

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### Topic 3: Fulfilling expectations

#### 4. What are your expectations regarding the role of the Centre?

#### 5. To what extent does the Centre help your work and activities?

*Probe: How would you define the Centre's objectives? To what extent do you feel they fulfil them? How do they fulfil them? Would you change anything with your engagement with the Centre? What would you expect from the Centre in the future?*

#### 6. What have you learnt from the collaboration with the Centre?

*Probe: Have you been inspired by the activities of the Centre to carry out new activities in your region?*



<b>Stakeholder Group</b>	<b>General Assembly members</b>
<b>Participants</b>	
<b>Date</b>	

INTRO: Thank you for finding the time to speak to me today. As you know, Aleph has been commissioned by UNESCO to undertake a renewal evaluation of the Regional Centre. As part of this work, we're speaking to a broad range of stakeholders working on Intangible Cultural Heritage.

### **Topic 1: Background**

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#### **1. In what capacity have you engaged with the Centre and its work?**

*Probe: How did you become a General Assembly member? What does the process entail? What is your role as a member of the General Assembly?*

### **Topic 2: Governance**

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#### **2. Can you tell us about the organisation of the General Assembly?**

*Probe: How is it organised, who participates? Who are the governance bodies responsible for the Centre? How involved are Member States in the Centre's governance? Are there any other mechanisms beyond participating in the General Assembly, or its Executive Board?*

#### **3. How are decisions made?**

*Probe: To what extent do you feel involved? Is the process transparent?*

#### **4. How satisfied are you with the General Assembly and its processes?**

*Probe: How often does the General Assembly take place? Is this considered to be adequate? How clear is the governance of the Centre? How diverse is the executive board? Does the executive board contain people from relevant technical/political backgrounds etc.?*

#### **5. Do you feel the Governance of the Centre needs to improve? If so, how?**

*Probe: How transparent is the appointment of the Executive Board? Are the meeting minutes, or the decisions of the Executive Board shared with other members of the General Assembly? Is there room for the input of other GA members?*

### **Topic 3: Fulfilling expectations**

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#### **6. To what extent does the Centre fulfil its objectives?**

*Probe: How have the Centre's activities contributed to support countries in the implementation of the 2003 Convention? Has the training targeted implementation? Has the Centre provided training to Member States specifically on the 2003 Convention?*

#### **7. To what extent does the Centre help your work and activities?**

*Probe: Would you change anything with your engagement with the Centre? What would you expect from the Centre in the future?*

<b>Stakeholder Group</b>	<b>Bulgarian Government representatives</b>
<b>Participants</b>	
<b>Date</b>	

INTRO: Thank you for finding the time to speak to me today. As you know, Aleph has been commissioned by UNESCO to undertake a renewal evaluation of the Regional Centre. As part of this work, we're speaking to a broad range of stakeholders working on Intangible Cultural Heritage.

### **Topic 1: Background**

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#### **1. In what capacity have you engaged with the Centre and its work?**

*Probe: Who are the main national stakeholders in the Bulgarian government, and what is their role? Do stakeholders consider the partnership with the Centre to be generally positive or negative?*

### **Topic 2: Communication**

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#### **2. How does the Bulgarian Government rate the level and quality of communication it has with the Centre?**

*Probe: How do you communicate? Email, online meetings? Has anything changed since 2017, and have there been any positive or negative changes? How satisfied are you with the degree of communication? Is the information provided by the Centre generally relevant, accurate and useful? Is the Centre responsive to requests for information?*

#### **3. How satisfied are you with the General Assembly and its processes?**

*Probe: How clear is the governance of the Centre? Does it align with your expectations? Do you feel the Governance of the Centre needs to improve? If so, how?*

### **Topic 3: Fulfilling expectations**

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#### **4. To what extent does the Centre meet your expectations?**

*Probe: Are you aware of the Centre's objectives, and do you feel they fulfil them? If so, how? Do government agencies feel that the Centre is supportive? Do they consider the Centre to be responsive to their needs? Does the Centre meet their expectations?*

#### **5. To what extent are you satisfied with the current relationship with the Centre?**

*Probe: Would you change anything with your engagement with the Centre? What would you expect from the Centre in the future?*

**SOME OF THESE STAKEHOLDERS WILL ALSO BE GENERAL ASSEMBLY MEMBERS, AS THERE IS SOME OVERLAP. SEE GENERAL ASSEMBLY QUESTIONS.**

<b>Stakeholder Group</b>	Centre Staff
<b>Participants</b>	
<b>Date</b>	

INTRO: Thank you for finding the time to speak to me today. As you know, Aleph has been commissioned by UNESCO to undertake a renewal evaluation of the Regional Centre. As part of this work, we're speaking to a broad range of stakeholders working on Intangible Cultural Heritage.

## Topic 1: Background

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### 1. Can you tell us about you became involved and started working at the Centre?

*Probe: How long have you worked at the Centre? Can you tell us about how you became involved, and the recruitment process?*

### 2. What is it like starting a job at the Centre?

*Probe: What is staff turnover - high or low? What is the average staff employment expectancy at the Centre? What policies are in place to ensure equity and inclusion in hiring and management practices?*

*Probe: Does the Staff have many vacancies? How long does it take to fill key positions? How often do staff leave? What is the average staff employment expectancy at the Centre?*

### 3. What have you been working on over the last few years? (Sub questions 4, 5 and 6)

#### 4. Can you tell us a bit about the training activities organised by the Centre?

*Probe: Has the Centre provided training to Member States specifically on the 2003 Convention?*

*How have the Centre's activities contributed to support countries in the implementation of the 2003 Convention? Has the training targeted implementation?*

*How has the Centre increased the capacity of regional experts through training?*

#### 5. What have been the main challenges to your work?

*Probe: To what extent did they affect your activities? How did you overcome these challenges?*

#### 6. Can you tell us a bit about the dissemination activities organised by the Centre?

*Probe: What publications has the Centre disseminated? What online platforms has it created to help disseminate good practices regarding ICH?*

*Has the Centre supported and promoted the setting up of public ICH registers?*

*What activities has the Centre conducted with local communities?*

*Has the Centre helped partners step up media coverage of ICH related topics?*

*How has the Centre improved access to information about ICH?*

#### 7. Can you tell us a bit about the research activities organised by the Centre?

*Probe: What events (conferences, workshops etc.) has the Centre coordinated?*

**8. To what extent is the Global Development Agenda integrated to your work?**

*Probe: Is the Centre focusing on any specific Sustainable Development Goals, and if so, which? How is the Centre measuring their progress towards the Global Development agenda?*

**Topic 2: Management**

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**9. How clearly defined are the roles at the Centre?**

*Probe: Is there a clear management line for projects? When you encounter an issue, who do you talk to? How easy is it to collaborate with other staff members to solve issues? How segregated are the tasks?*

**10. As a staff member, what access to training and guidance do you have? What are the possibilities for capacity improvement?**

*Probe: To what extent do manuals and guiding documents exist for staff to ensure efficient implementation of activities? Are staff aware of these documents? Do they comply? How often does the Centre assess the performance of its staff? Is the Centre's technical expertise commensurate with task it is required to perform? What training does the Centre provide to build the capacity of its staff?*

**Topic 3: Accountability and Learning**

---

**11. What mechanisms are in place for monitoring the implementation of the Centre's activities?**

*Probe*

*Probe: Has the Centre collected information regarding the training needs of UNESCO Member States?*

**12. How is the Annual Report elaborated and drafted?**

*Probe: Who does it? How long does the process take? Who is involved? Does the reporting lead to significant changes in the organisation? How are lessons and best practices communicated within the Centre?*

**13. What would you improve in the Centre's organisation and activities?**

*Probe: What are the mechanisms for improving the Centre?*

**Topic 4: Collaboration**

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**14. Can you describe the stakeholders you collaborate with?**

*Probe: How do you organise the work you do together? How, and how often do you communicate? Has the Centre increased its network of partners? How has it increased participation? Who are the main stakeholders in international organisations, councils and associations, and what is their role in supporting the role of the Centre? Is the Centre actively seeking new partnerships, or deepening existing ones?*

**Topic 5: Funding**

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**15. How successful do you think the current funding model is?**

*Probe: To what extent do you think the Annual Budget is sufficient?*

*Is there a shortfall? If so, how has the Centre ensured continuous funding for its activities?*

*Who are the main donors and how good does the Centre think their relationship is? To what extent has the Centre tried to diversify its funding base? Has it been successful in this endeavour?*

**16. How do you mobilise additional funds for your work?**

*Probe: Can you give examples of how you obtained funding in the last few years?*

*Has the Centre been successful in fundraising for activities externally?*

*How does the Centre mobilise funds from induction fees and annual membership fees? What percentage of its extra-budgetary resources does this represent?*

*What additional economic activity does the Centre undertake? What further sources exist?*

*What percentage of its extra-budgetary resources does this represent?*

**17. Do you have information about the long-term sustainability and impact of your activities?**

*Probe: Do you know if the activities you carry out continue after your involvement? Do you have any reports on their long-term effects?*

**Topic 6: Autonomy**

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**18. What is the Legal status of the Centre?**

*Probe: what is it and is it not allowed to do? Is it allowed to contract? Is it allowed to institute legal proceedings? Is it allowed to acquire and dispose of property?*

**19. How influential is the Bulgarian government in the decisions of the Centre?**

*Probe: Once activities have been funded, does the Centre have capacity to maintain them for their duration?*

<b>Stakeholder Group</b>	Centre partners (NGOs, communities and other stakeholders)
<b>Participants</b>	
<b>Date</b>	

INTRO: Thank you for finding the time to speak to me today. As you know, Aleph has been commissioned by UNESCO to undertake a renewal evaluation of the Regional Centre. As part of this work, we're speaking to a broad range of stakeholders working on Intangible Cultural Heritage.

### Topic 1: Background

---

#### 1. For how long have you and your institution worked with the RC?

*Probe: Can you tell us how you became involved? How do they feel about the quality of their engagement with the Centre? Are there specific examples of partnerships or collaborations that have been formed? How long do these partnerships last?*

### Topic 2. Communication

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#### 2. How would you characterise your communication with the Centre?

*Probe: How do you communicate? Email, online meetings? Has anything changed since 2017, and have there been any positive or negative changes? How satisfied are you with the degree of communication? Is the information provided by the Centre generally relevant, accurate and useful? Is the Centre responsive to requests for information?*

### Topic 3. Quality of work

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#### 3. What do you see as the objectives of the Centre? To what extent you consider that the RC has fulfilled its objectives, and why?

*Probe: How has the Centre improved access to information about ICH?  
Has the Centre helped partners step up media coverage of ICH related topics?  
What activities has the Centre conducted with local communities?  
How has the Centre included younger generations in its activities?  
How has the Centre increased the capacity of regional experts through training?*

#### 4. To what extent does the RC carry out its tasks efficiently and effectively?

*Probe: How did the Centre help you or your organisation? Can you give specific examples of activities you carried out together, and their strengths and weaknesses?*

#### 5. What are your suggestions for improving your relationship with the Centre?

*Probe: Would you change anything with your engagement with the Centre? What would you expect from the Centre in the future?*

**If this is an international network or a non-Bulgarian partner...**

#### 6. To what extent do you feel the Centre is representative of the diversity of Intangible Cultural Heritage across the region?

*Probe: To what extent are all countries equally represented? How is that manifested in the Centre's activities? What is missing in representation? What other activities, if any, should the Centre perform to improve the regional balance?*

#### 4.3. Interview list

See table on the following page.

Table 2. List of Key Informant Interviews. Names in blue were interviewed in person in Sofia, and names in yellow were interviewed online.

Category	Organisation	Person
Centre staff	Centre	Ms Irena Todorova, Executive Director
		Iliyana Rousseva, Communication and coordination
		Mirena Staneva, Programs and Projects
		Nadejda Ilieva, Expert and main point of contact for the evaluation
		Chayana Istatkova, International activities
UNESCO staff	Headquarters	Helena Drobna, Regional Officer and ICH Programme Specialist
		Susanne Schnuttgen
		Rasul Samadov
	Venice Regional Bureau	Mateo Rosati* Programme Specialist for Culture and Intersectorial Activities
Sarajevo Antenna	Sinisa Sesum, Head of Office	
Bulgarian Government Institutions	Bulgarian Ministry of Culture	Minister of Culture, Prof. Velislav Minekov
		Advisor to the Minister of Culture, Svetoslav Traykov
		Head of the Minister's Political Cabinet, Dr Boris Danailov
	Bulgarian Ministry of Foreign Affairs	Hristo Georgiev, Secretary-general of the National Commission of the Republic of Bulgaria for UNESCO 2018 – 2021
		Velislava Petrova, Chairman of the National Commission of the Republic of Bulgaria for UNESCO 2022- present, and deputy minister of Foreign Affairs
		Angel Bandjov, Deputy Chairman of the National Commission of the Republic of Bulgaria for UNESCO
		Emanuela Tomova, UNESCO National Commission
	Bulgarian Academy of Sciences	Petko Hristov* (EB member)
		Milena Lubenova, Institute of Ethnology and Folklore Studies with Ethnographic Museum, also chair of an NGO based in Pernic
Miglena Ivanova, Institute of Ethnology and Folklore Studies with Ethnographic Museum		
Member states	Moldova	Andrei Prohin*, National Museum of Ethnography and Natural History (EB member)
	Turkey	Ahmet Erhan Aral (Also UNESCO Chair)

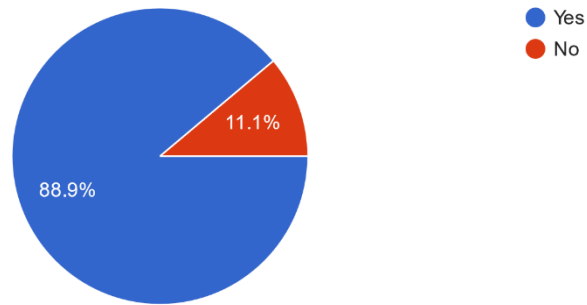


National Focal points	Albania	Bendis Pustina (also Member State representative)
	Romania	Ioana Repciuc
Partners and Beneficiaries	Museums	Miladin Savic, Museum in Bosnia and Herzegovina
		Iglika Mishkova, Ethnographic museum, Sofia
		Saša Srećković, Ethnographic museum of Serbia
	Heritage professionals	Marticka Bozhilova, TV producer
		Irena Bokova, ICH expert and editor of the 'Living Heritage' Journal
	UNESCO facilitators	Saša Srećković, Ethnographic museum of Serbia
Meglana Zlatkova, Facilitator network, Bulgarian ICH academic		
Other category 2 Centres	CRESPIAL Peru	Mirva Victoria Aranda, Director

#### 4.4. Survey results

1. Are you currently collaborating, or have you collaborated since 2017 on any activity for the safeguarding of living heritage with the Centre?

9 responses.

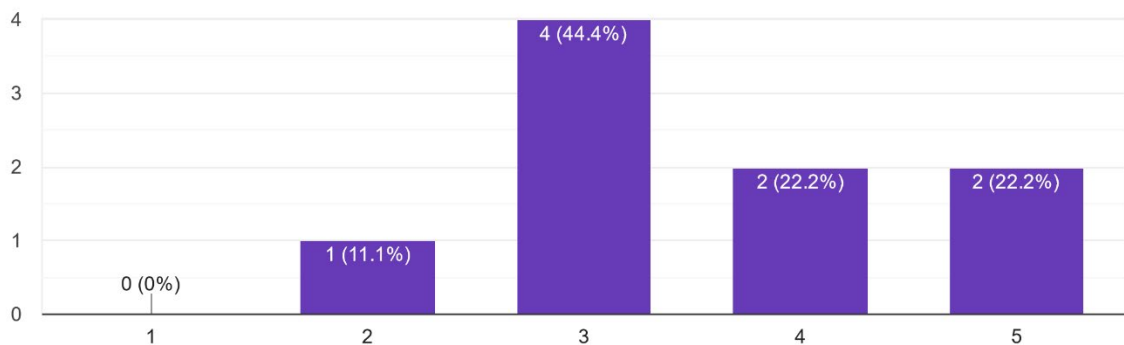


2. To what extent are you satisfied or dissatisfied with the level of communication you have with the Centre?

1 = Extremely dissatisfied

5 = Extremely satisfied

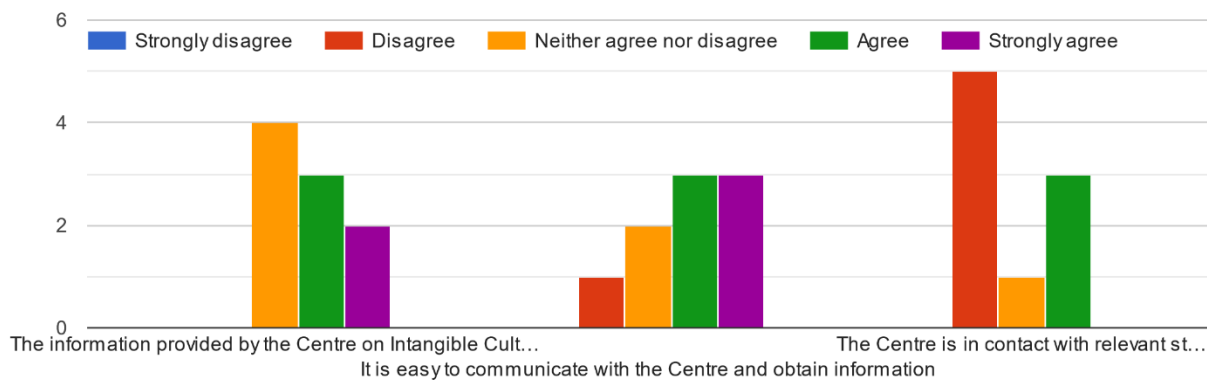
9 responses.



3. To what extent do you agree or disagree with the following statements?

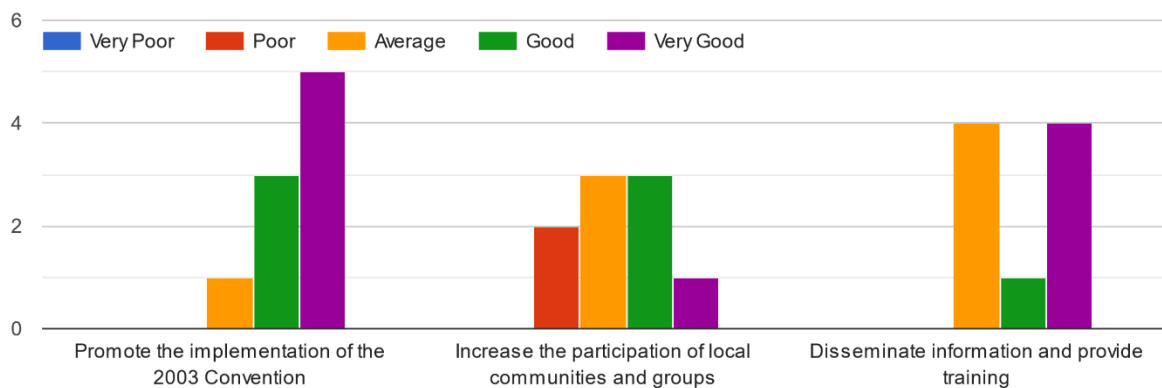
- The information provided by the Centre on Intangible Cultural Heritage (ICH), research, training and networking opportunities is relevant, accurate and useful.
- It is easy to communicate with the Centre and obtain information
- The Centre is in contact with relevant stakeholders in my country (museums, experts, and local communities).

9 responses.



4. The objectives of the Centre are to promote the implementation of the 2003 Convention, increase the participation of local communities and disseminate information and provide training in the field of Intangible Cultural Heritage. How would you rate the Centre's performance in each of these areas?

9 responses.



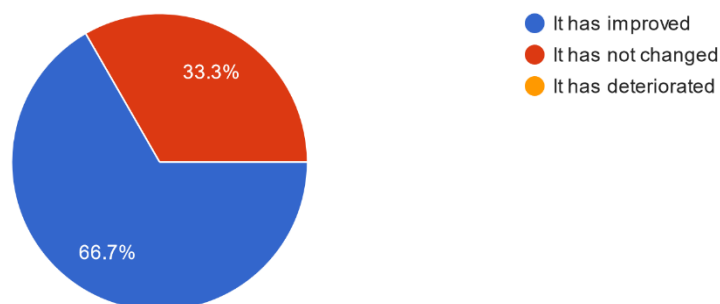
**5. Can you give us details? (Examples of the Centre fulfilling its mission, or possible obstacles encountered)**

*5 responses.*

In my experience as a country representative, I generally feel that the Centre is devoting a lot of activities to the promotion of living heritage to the Bulgarian public and decision-makers, to high-level institutions, to organizing events and editing publications for experts. I am not sure how its activities involve local communities and groups, and how it provides grassroots conversation on the common effort of countries in the region to safeguard living heritage. I believe it lacks a vision for promoting connection and collaboration between living heritage across national borders within our region, even though there is such a wealth of similarities and common historical and social background of our countries (As a good counterexample, the Northern European countries are very active in displaying and making good use of their connections even without the support of such an institution). If you contact them, of course they answer and try to be helpful, but there is not a lot of initiative coming directly from them.
Living Heritage Journal, Capacity building workshops, reports, web site
The Centre has many projects with museums, NGOs and universities, also has Facebook, website
Information that the Sofia Center is providing does not go through official channel, but mostly through a country's representative so it does not reach relevant persons/stakeholders/organizations and so on.
The Centre always tries to involve the state parties in its activities, whether those maybe publications, exhibitions etc, by informing them (us) on time and being available for any inquiries that may occur. This kind of communication reinforces the bonds with the countries and with local communities and groups, thus ultimately promoting the implementation of the Convention.

**6. To what extent do you feel your knowledge of the 2003 Convention has changed thanks to your involvement with the Centre?**

*9 responses.*



**7. Please explain.**

6 responses.

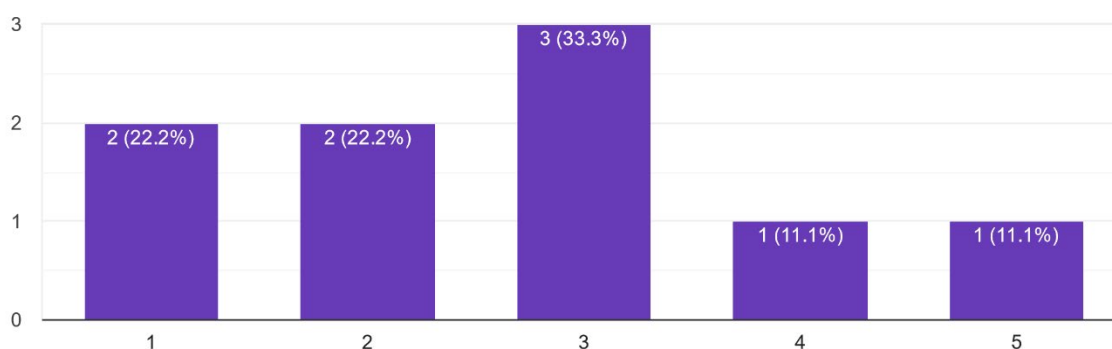
I have benefited from the trainings and information exchange during the meetings of the network of experts in south-eastern Europe.
they share theory ( conference) and practise (workshops and exhibition organised)
With new, additional information
We had a special workshop on a national level with the help of the Centre.
One of the highlights of our collaboration with Centre has to be the Capacity Building Workshop we coorganized. Through this collaboration we had the opportunity to witness first hand how such projects are set up and of course the workshop itself has extended our knowledge of the 2003 Convention.
We have done so meny ICH programs with the Center and its all are very porductive and usefull.

**8. To what extent do you feel that the activities of the Centre adequately support the safeguarding of the intangible cultural heritage present in your country?**

From 1 = The safeguarding of the living heritage practiced in my country is not at all part of the Centre's activities

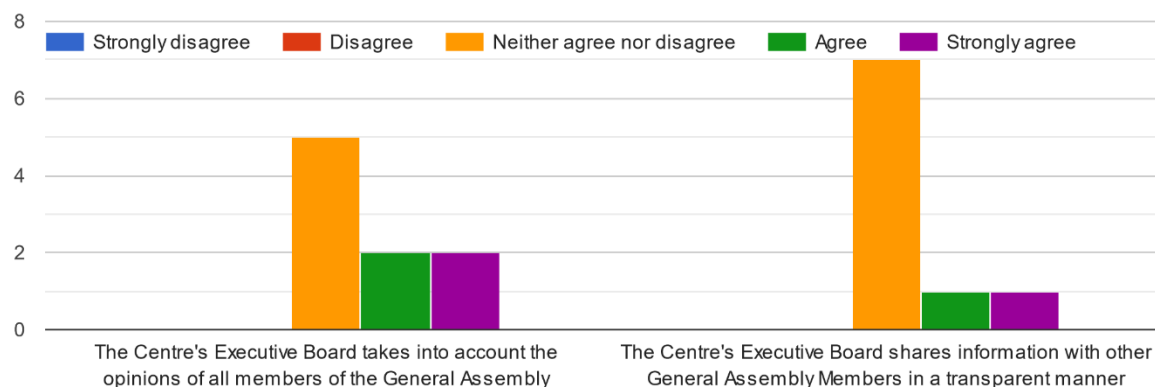
To 5 = The safeguarding of the living heritage practiced in my country is a very strong part of the Centre's activities

9 responses.



9. To what extent do you agree or disagree with each of the following statements?

9 responses.



10. What suggestions, if any, do you have for the Centre to improve in the delivery of its activities and/or become a better partner in the future?

6 responses.

I mentioned some suggestions at #5. Probably it needs much better communication with representatives of the states, creating events that would involve also local communities, not just state representatives and experts, maybe supporting the drafting and implementation of European projects that would create partnerships of member states if they do not have enough funding for the activities concerned. Generally, there is place for improving the active role that they could play in such a dynamic and rich field that living heritage safeguarding is.
to upgrade the web site - connections to national registers of ICH, to separately present and promote international inscriptions from countries of the Centre.
More communication with States focal points.
More activities (one main activity per year and maybe even smaller activities during one year) in each country and not only in Bulgaria aimed at specific subjects but with the participation of relevant experts from various institutions (museums, scientific institutes, universities and so on) and state officials to make it much more important
I strongly believe that the Centre does everything in its means and power to deliver results regarding its mission, which is no other than the implementation of the 2003 Convention in SE Europe. If anything i would say that the state parties need to be more active and utilize the opportunities of collaboration the Centre presents us with on a regular basis.

I suggest after the Covid 19 period again continue fruitful collaboration with the Center, especially in the field of ICH trainings.

#### 4.5. Travel Plan

### **Schedule November 22, 2022**

#### **Regional center**

10:00 a.m. Visit to the Regional Centre for the Safeguarding of Intangible Cultural Heritage in South-Eastern Europe under the auspices of UNESCO

#### **Interviews with the secretariat of the Regional Center**

11:00 – 12:00 h - Iliyana Russeva – expert, RC secretariat

12:00 – 13:00 h - Nadejda Ilieva – expert, RC secretariat

13:00 – 13:30 h - Break

#### **Ethnographic Museum**

14:00 – 15:00 h - Igljka Mishkova – Chief curator, researcher, Bulgarian Academy of Science

15:00 – 16:30 h – Break

#### **Sofia University**

17:00 – 18:00 - Meglena Zlatkova – facilitator, researcher and professor in University of Plovdiv

### **Schedule November 23, 2022**

#### **Regional center - Interviews**

10:00 – 11:00 h Mirena Staneva – expert, RC secretariat

11:00 – 12:00 h Chayana Istatkova – expert, RC secretariat

12:00 – 13:00 h Irena Todorova – RC Executive Director

13:00 – 14:00 h Petko Hristov – Bulgarian Academy of Science and Chairperson of the RC GA

14:00 – 14:30 h Hristo Georgiev – ex representative of the National Commission for UNESCO

14:30 – 15:30 h Marticka Bozhilova – producer, RC partner in the project Filming ICH

## **New Bulgarian University 615/2**

16:30 – 17:30 Prof. Dr. Irena Bokova PhD – /French language/ – Editor in Chief of the RC Journal “Living Heritage” and member of the Bulgarian Academy of Science, Head of the Department Anthropology in New Bulgarian University.

## **Schedule November 24, 2022**

### **Ministry level meeting**

#### **Ministry of Culture of the Republic of Bulgaria**

11:00 a.m. – 11:30 a.m.

Minister of Culture - Prof. Velislav Minekov

Deputy Minister of Culture - Prof. Dr. Borislava Taneva

Head of the minister's political cabinet - associate professor, Dr. Boris Danailov

### **Interviews**

11:30 – 12:30 h – Silva Nalbantyan-Khacheryan PhD - Director of the of the "Regional and international activities' Directorate

12:30 – 1:00 h - Ekaterina Djumalieva - Director of the Cultural Directorate heritage, museums and fine arts – Not confirmed

13:30 – 14:30 – **Bulgarian Academy of Science** – at the Regional Centre Office  
Miglana Ivanova PhD /english  
Milena Lubenova PhD /translation

## **Schedule November 25, 2022**



## **Ministry of Foreign Affairs of the Republic of Bulgaria**

### **National Commission of the Republic of Bulgaria for UNESCO**

11:00 – 12:00 – **Angel Bandjov**, Deputy Chairman of the National Commission of the Republic of Bulgaria for UNESCO.  
Emanuela Tomova, General Secretary of the National Commission of Republic of Bulgaria for UNESCO.

14:30 – 15:00 - Velislava Petrova, **Deputy Minister of Foreign Affairs** and Chairman of the National Commission of Republic of Bulgaria for UNESCO.

<https://www.mfa.bg/en/ministry/structure/deputy-ministers/velislava-petrova>

#### 4.6. Renewal Evaluation Index

See attached Excel file.

#### 4.7. Key documents consulted

IOS (2021) Evaluation of UNESCO's action in the framework of the 2003 Convention for the Safeguarding of the Intangible Cultural Heritage
Martin Jenkins (2020) Evaluation of CRESPIAL. Final report
Sang Mee Bak (2017) Evaluation of the Regional Centre for the Safeguarding of the Intangible Cultural Heritage in South-eastern Europe under the Auspices of UNESCO, Sofia, Republic of Bulgaria
Sofia Centre (2012) Financial, Administrative and Human Relations Management Rules
Sofia Centre (2012) RULES OF PROCEDURE of the General Assembly of the Association "Regional Centre for the Safeguarding of Intangible Cultural Heritage in South-Eastern Europe Under the Auspices of UNESCO"
Sofia Centre (2014) Action Plan 2014
Sofia Centre (2015) Statutes of the Association 'Regional Centre for the Safeguarding of the Intangible Cultural Heritage in South-Eastern Europe under the auspices of UNESCO
Sofia Centre (2017) Budget May
Sofia Centre (2017) Long-Term Programme 2017-2021. General Assembly, 16 May 2017, Sofia.
Sofia Centre (2017) Minutes May
Sofia Centre (2017) Workplan May - 2018
Sofia Centre (2018) Activity Report November
Sofia Centre (2018) Financial Report January-October
Sofia Centre (2018) Financial Report November
Sofia Centre (2018) Minutes
Sofia Centre (2019) Activity Report
Sofia Centre (2019) Budget
Sofia Centre (2019) Financial Report
Sofia Centre (2019) Minutes
Sofia Centre (2019) Statutes of the Association 'Regional Centre for the Safeguarding of the Intangible Cultural Heritage in South-Eastern Europe under the auspices of UNESCO

Sofia Centre (2019) Workplan
Sofia Centre (2020) Activity Report
Sofia Centre (2020) Budget
Sofia Centre (2020) Financial Report
Sofia Centre (2020) Minutes
Sofia Centre (2020) Workplan
Sofia Centre (2021) Activity Report
Sofia Centre (2021) Draft Budget
Sofia Centre (2021) Draft Workplan
Sofia Centre (2021) Minutes of the General Assembly
Sofia Centre (2022) CB workshops /Needs assessments in Member states
Sofia Centre (2022) Budget
Sofia Centre (2022) Member States
Sofia Centre (2022) National Focal Points
Sofia Centre (2022) Workplan 2022
UNESCO (2012) Policy Brief 1: Improving UNESCO's Category 2 Centre network
UNESCO (2012) Category 2 Institutes and Centres: Guidance Note on the renewal assessment procedures of Category 2 Institutes/Centres
UNESCO (2013) 37 C/18 Part I, Revision of the integrated comprehensive strategy for Category 2 Institutes and Centres under the auspices of UNESCO
UNESCO (2014) 37 C/4 2014-2021 Medium-Term Strategy
UNESCO (2014) 2014-2017 37 C/5 Approved Programme and Budget
UNESCO (2016) 38 C/5 Approved – Programme and Budget 2016-2017 (Second biennium of the 2014-2017 quadrennium)
UNESCO (2018) Overall Results Framework for the 2003 Convention
UNESCO (2018) Management Framework Category 2 Institutes and Centres under the auspices of UNESCO
UNESCO (2019) 40 C: Strategy for Category 2 Institutes and Centres under the Auspices of UNESCO
UNESCO (2020) Basic texts of the 2003 Convention for the Safeguarding of the Intangible Cultural Heritage. 2020 Edition
UNESCO (2020) Eight annual coordination meeting of Category 2 Centres active in the Field of Intangible Cultural Heritage

UNESCO (2022) 41 C/4 Medium-Term Strategy 2022-2029

UNESCO and Government of Bulgaria (2017) Agreement concerning the continuation of the Regional Centre for the Safeguarding of the Intangible Cultural Heritage in South-Eastern Europe under the Auspices of UNESCO (Category 2)

Websites

Centre website: <https://www.unesco-centerbg.org/en/>

UNESCO ICH website, section on Category 2 Centres with access to the main documents:  
<https://ich.unesco.org/en/category2>

## 4.8. Terms of Reference



### CALL FOR PROPOSALS

The UNESCO Living Heritage Entity is looking for a team of experts/evaluators to carry out a renewal evaluation of the Regional Centre for the Safeguarding of the Intangible Cultural Heritage in South-Eastern Europe, a UNESCO Category 2 Centre based in Sofia, Republic of Bulgaria.

Proposals should reach UNESCO (ICH-capacity@unesco.org) by **31 July 2022**.

#### Context

Category 2 institutes and centres under the auspices of UNESCO are a global network of institutions of excellence in the Organization's domains of competence. Given their expertise, these institutes and centres contribute to the implementation of UNESCO's priorities, programmes, and global development agendas during a defined period. They foster international and regional cooperation, research, knowledge production, policy advice, and capacity enhancement. Though independent of UNESCO, category 2 institutes and centres are a privileged partner of the Organization with access to international and intergovernmental bodies and networks, and may leverage UNESCO's international reach and convening powers. Category 2 institutes and centres under the auspices of UNESCO are an integral part of the Organization's Comprehensive Partnership Strategy.

The UNESCO Strategy for Category 2 Institutes and Centres under the auspices of UNESCO<sup>4</sup> provides that an agreement for the establishment of a category 2 institute or centre is for a defined time period, not exceeding eight years. The agreement may be renewed by the Director-General, with the approval of the Executive Board, in light of an evaluation of the activities of the institute/centre and of its contribution to the strategic programme objectives of the Organization and the aforementioned Strategy.

The 35th session of the General Conference, in its 35 C/Resolution 58, approved the establishment in the Republic of Bulgaria of the Regional Centre for the Safeguarding of the Intangible Cultural Heritage in South-Eastern Europe (hereafter, 'the Centre'). An agreement between the Government of the Republic of Bulgaria and UNESCO was signed accordingly. Following the first evaluation undertaken in 2017, a new agreement was signed between UNESCO and the Government of the Republic of Bulgaria for the period of six years (2018-2024). The Government of the Republic of Bulgaria submitted a request for renewal of the agreement. To this end, an evaluation of the Centre will be carried out.

The objectives of the Centre are to:

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<sup>4</sup> Available at <https://ich.unesco.org/doc/src/46612-EN.pdf>

- a) promote the 2003 Convention for the Safeguarding of the Intangible Cultural Heritage and contribute to its implementation in the South-Eastern European sub-region;
- b) increase the participation of communities, groups and individuals in safeguarding the intangible cultural heritage in the South-Eastern European countries;
- c) enhance the capacity of UNESCO's South-Eastern European Member States in the safeguarding of ICH;
- d) coordinate, exchange and disseminate information regarding the safeguarding of ICH in the sub-region; and
- e) foster regional and international cooperation for the safeguarding of ICH.

The functions of the Centre are to:

- a) instigate and coordinate research into practices of safeguarding ICH elements present in the South-Eastern European countries, as referred to in Articles 11,12,13 and 14 of the 2003 Convention.
- b) organize long-term and short-term training courses on the following subjects:
  - the 2003 Convention and its Operational Directives;
  - different examples of policies including legal, administrative, technical and financial measures fostering the safeguarding of ICH;
  - introduction to UNESCO publications on identification and documentation of ICH and their application in the field work;
  - safeguarding ICH through formal and non-formal education; and,
  - any other new training content developed by UNESCO for the effective implementation of the 2003 Convention.
- c) enhance international, regional, and sub-regional cooperation through networking with institutions active in the domain of ICH, notably those established under the auspices of UNESCO (category 2), in order to coordinate activities, exchange information and knowledge concerning the safeguarding of ICH, and promote good practices.

## **Purpose**

The main objectives of this evaluation are to assess the Centre's performance with respect to its objectives and functions (see above), and its contribution to UNESCO's Approved Programme and Budget (C/5), including global strategies and action plans as well as sectoral programme priorities. The conclusions of the renewal evaluation shall be submitted to the UNESCO Intersectoral Review Committee that will make the recommendation to the Director-General as to whether an agreement with the Centre should be renewed or not. Based on this recommendation, the UNESCO Executive Board will examine the renewal request, decide on the renewal or non-renewal of the designation of the Centre as a category 2 centre under the auspices of UNESCO and authorize the Director-General to conclude an agreement with the Government of Republic of Bulgaria.

The conclusions of the renewal evaluation shall be shared with the Government of the Republic of Bulgaria and the Centre, and will be made available on the website of the 2003 Convention for the Safeguarding of the Intangible Cultural Heritage ([ich.unesco.org](http://ich.unesco.org)).

## **Scope**

The following parameters shall be considered by the independent experts contracted to undertake the renewal evaluation. The independent experts shall have had no prior affiliation with the Centre, nor its partners in the carrying out of its activities and shall draft the renewal evaluation in English:

1. the extent to which the Centre's objectives as set out in the agreement signed with UNESCO were achieved;

2. the relevance of the contribution of the Centre's programmes and activities to the achievement of UNESCO's programme for safeguarding intangible cultural heritage and the effective implementation of the 2003 Convention as specified in the Approved Programme and Budget covering the period under evaluation (39 C/5 and 41 C/5), in particular the achievements of the 2003 Convention's global capacity building programme and the programme for safeguarding intangible cultural heritage in formal and non-formal education, in accordance with the agreement;
3. the relevance of the contribution of the activities of the Centre to global development agendas, notably to the 2030 Agenda for Sustainable Development and the related SDGs;
4. the quality of coordination and interaction with UNESCO, both at Headquarters and in the field, as well as with National Commissions, other thematically-related category 1 and 2 institutes or centres with regard to planning and implementation of programmes;
5. the partnerships developed and maintained with government agencies, public or private partners and donors;
6. the nature and efficiency of the Centre's governance, including organizational arrangements, management, human resources and accountability mechanisms;
7. the financial resources available for ensuring sustainable institutional capacity and viability, and,
8. the extent to which the Centre enjoys within its territory the autonomy necessary for the execution of its activities and legal capacity to contract, institute legal proceedings, and to acquire and dispose of movable and immovable property.

## **Methodology**

The renewal evaluation of the Centre will include:

- A desk study of relevant documents, provided by the Centre and UNESCO Secretariat;
- A visit to the Centre, including interviews with the Centre's management and staff;
- Interviews (telephone, online and/or via e-mail) with the Centre's stakeholders, collaborators, and beneficiaries as well as UNESCO staff concerned;
- Preparation of the renewal evaluation report and the preliminary draft agreement to be concluded between UNESCO and the Government of the Republic of Bulgaria, based on the model provided by UNESCO, in case the evaluation recommends the renewal.

## **Draft evaluation report**

A draft report will present findings, conclusions and recommendations, with a draft executive summary. The UNESCO Culture Sector, the Government of the Republic of Bulgaria and the Centre itself will have the opportunity to comment and give feedback to the evaluation team.

## **Final evaluation report**

The final report (max. 20 pages, excluding annexes) should be structured as follows:

- Executive summary (maximum four pages);
- Introduction (background, purpose and scope);

- Methodology;
- Findings;
- General recommendations to the Centre for improving the effectiveness of its operations and for UNESCO for improving the effectiveness of its coordination and interaction with the Centre; specific recommendations for amending the provisions of the agreement in order to improve the functioning and activities of the Centre;
- Annexes, including a draft agreement to be concluded between UNESCO and the Government of the Republic of Bulgaria in case the evaluation recommends the renewal, interview list, data collection instruments, key documents consulted, and terms of reference.

The language of the report shall be English.

### **Requirements for the renewal evaluation team**

The evaluation will be conducted by a team of 2 independent experts(ideally gender-balanced). A single proposal/expression of interest must be submitted on behalf of the team.

The team should have the following qualifications:

- At least 7 years of professional experience in research and/or capacity-building in the field of cultural heritage, cultural diversity, cultural policy or culture and development; experience in intangible cultural heritage will be an asset;
- At least 7 years of professional experience in policy and programme evaluation in the context of international development;
- Excellent knowledge of English (written and spoken) and proven draft skills in English;
- Knowledge of the role and mandate of UNESCO and its programmes;
- Knowledge and experience in qualitative and quantitative data analysis
- Knowledge of UN mandates in gender equality and human rights will be an asset

### **Roles and responsibilities**

Local travel, materials, secretarial support and office space will be provided by the Centre during the visit. The experts will be responsible for telecommunications and printing of documentation.

The Living Heritage Entity of the UNESCO Culture Sector will facilitate and oversee the renewal evaluation process, to the extent possible, by providing any relevant information, and will be responsible for evaluating and approving the final report.

### **Schedule**

The renewal evaluation shall be completed no later than **30 December 2022**.

The schedule for the evaluation is as follows:

- A desk study of background documents (to be completed prior to the visit to the Centre);
- Visit to the Centre;



- Writing and submission of the draft evaluation report no later than 15 December 2022;
- Submission of the final evaluation report (before 31 January 2023).

The date of the mission to the Centre will be defined by UNESCO in coordination with the Centre and taking into account the availability of evaluator(s).

### **Submission of proposals**

Proposals should be submitted in English or French, consisting of:

1. Curriculum vitae of expert(s)/evaluator(s) and, if applicable, a company profile;
2. Letter expressing interest and clearly identifying how the team meets the required skills and experience;
3. An approach and methodology for the assignment, a Workplan and comments on the Terms of Reference if any (in brief);
4. A total cost (quoted in US dollars), distinguishing the fees for services from the travel expenses, with a breakdown of the cost and number of working hours required for each phase of the schedule.

Proposals should be submitted no later than **31 July 2022**, midnight (Paris time) to the Living Heritage Entity ([ICH-capacity@unesco.org](mailto:ICH-capacity@unesco.org)). Please note that proposals submitted through other channels will not be considered. Selection will be made on the basis of best value for money.