Republic of Bulgaria

National strategy for development of scientific research in the Republic of Bulgaria 2017 – 2030

Better science for better Bulgaria

Contents

4. Policies, actions and measures for their implementation

Program to achieve the objectives of the strategy is comprised by major policies outlined based on the vision and specifying mechanisms for their implementation, which will be used by public authorities. Each policy is associated with certain specific objectives that will contribute to the success of the strategy as well as activities and specific measures to achieving the targets. Thanks to the interdependence of policies, part of the activities and measures contribute to the achievement of several goals or policies.

As the main measures of the state are financial and regulatory, originally two separate horizontal policies have been defined, related to these activities. In describing these policies are outlined general principles while the details of the concrete measures are spelled out in other policies. Effective implementation and combination of the two horizontal policies is crucial to the achievement of the main objective of the strategy:

Through large-scale, fast and long-term development of the research system, Bulgaria is to become an attractive center for advanced research and development of new technologies, to recover and raise the international prestige of the country in science to retain and attract talented scientists in Bulgaria and as a result to achieve long-term economic growth and significantly improve the quality of life in the country.

4.1. Horizontal policy for adequate and effective funding

Essential to fulfillment of the objectives of the strategy is enhanced and sustained research funding from the state through a series of interconnected and efficient financial instruments. It is important to emphasize that financial instruments should be balanced and complementary. Investing funds in isolated activities will have a negative effect. In developing the financial instruments is necessary to comply with various funding sources such as the state budget, operational programs, European and international programs and anticipated private sector funding.

Horizontal activity 1. Increasing of public funding for research.

In the Strategy for smart, sustainable and inclusive growth Europe 2020, the European Union has set itself the aim for its Member States to invest 3% of their GDP in R & D by 2020 (1% public funding and 2% private sector investment). The Bulgarian national target, set in the National Reform Program, is significantly lower - 1.5 percent. In the previous strategy adopted by the National Assembly, the country had set task state R & D funding to increase gradually to 0.60% for 2015 and 0.70% of GDP in 2020. Despite the decision of the National Assembly within three budget estimates of the country annually validated by the Council of Ministers, from adopting the strategy to present, has not been forecast increasing of the public funding in the sector and the real value for 2015 is 0.27%, more than twice lower than planned.

This strategy provides the following increase of direct R & D funding from the state budget per year (Table 6) for the first two stages:

Table 5. Planned consolidated fiscal programme, excluding the expenditure from ESIF, on R&D as a percentage of GDP

Year	***2018***	***2019***	***2020***	***2021***	***2022***	***2023***	***2024***	***2025***
% of GDP	***0.38***	***0.45***	***0.50***	***0.60***	***0.70***	***0.80***	***0.90***	***1.00***

By adopting the strategy of the National Assembly, Council of Ministers will be required to monitor the implementation of the adopted budget financing in the adoption of three-year budget estimates the country.

Public funds should be distributed between institutional and project / program funding as well as for the implementation of international commitments and participation in international programs (incl. EU Framework Program).

As public and private investment are interconnected, it is expected an increase in public funding to have a catalytic effect on private funding to reach a value of 1.5% in 2020 and 2.0% of GDP in 2025

It is important to emphasize that for the success of the strategy it is necessary not only to increase the investment, but also the intelligent distribution and effective management in view of expected and achieved results.

1(a) Enhanced institutional funding covering different components.

Institutional funding is basic to public research organizations and should provide normal conditions for successfully carrying out the research. Widely proclaimed ideas that funding of science should only be on a project basis, are inconsistent, since they can lead to the destruction of authoritative scientific schools and flourish pseudoscience in their place. World experience clearly shows that not only is necessary balance between institutional and project financing, but that they are interrelated.

Institutional funding should provide the necessary resources for:

- salaries and social security contributions of scientists and employees engaged in research, corresponding to their qualifications;
- improving of working conditions;
- operation, maintenance and renewal of infrastructure;
- government commitments and national activities;
- stimulate research at a high level and other types of incentives provided in the policies of the strategy;
- fundamental research of researchers and trainees (basic resources that can be allocated on a project basis).

Of particular importance is the amount of institutional funding for science to be bound to actual scientific results achieved by scientific organizations and universities. Based on this principle, it is necessary to develop a system for additional institutional funding for research at universities with internationally recognized scientific excellence, which is not bound by the subsidy for training students.

1(b) Enhanced project and programme financing as a tool for reception of social challenges and realization of state policies.

Project and programme financing are main tools of the state for maintenance of the scientific capacity and development of the scientific research in the country, as well as for reception of social challenges and implementation of state policies and also for influencing the balance between separate components of Research and development activity. Although at the moment the correlation program-project/institutional financing is above the levels, characteristic for the EU, the project financing must be increased in its absolute value and realized regularly.

When defining the funds, directed to the particular policies, activities and measures in the strategy, the specifics of the different finance sources must be taken into account – funds from the state budget (through competitions of the Bulgarian National Science Fund), funds according to operative programs and framework programs of the EU, as well as private financing. Since private financing is directed exclusively to applied researches of particular problems which are of interest to the financial source, the funds from the state budget must be directed anteriorly to the development of the human potential and to directed fundamental researches.

The program financing by Operational Programme “Science and Education for smart growth” will be focused on thematic areas of the Innovation strategy for smart specialization, which will contribute to the development of the applied researches and thence for innovations in the areas which are of economic importance to the country.

4.2. Horizontal policy for legislation changes

Another type of activities, which the state can use in order to realize the set goals, are the changes of valid legal acts and the passing of new laws and other legislation documents. The strategy envisions synchronized legislation changes which will regulate the legal part of the organization, financing and development of the science in the country, as well as will provide reformation of the management and administrative entities, related to the scientific researches.

Horizontal activity 2. Synchronized changes in the legislation acts, related to the implementation of the strategy

These changes aim at implementation of minimal national criteria for the academic positions and scientific degrees as well as guaranteeing of the minimal payment for each position. It is necessary to define synonymously different terms such as “scientist”, “young scientist”, “researcher”, “post-doctoral student” and others, the definitions should be synchronized with the ones in the EU. The implementation of the periodic attesting through objective scientific and metric indicators will be a legal ground for the differentiated institutional financing as well as for differential payment of the scientists. This activity also includes changes of different laws and

other legislation acts through the implementation of incentives for private investments in Research and development activity, regulating the relationship – science – state media and etc.

4.3. Horizontal policy for modernization and reformation of the research system.

According to the recommendations of the peer review for better and more competitive financing of the research it is necessary to re-structure the National Science Fund into one agency for financing of scientific researches, which is politically and operatively independent. It must significantly increase the multiannual programmes for provision of gratuitous funds for scientific researches assisted by a transparent, responsible, quality-based competition, the criteria for that must be envisioned based on the international standards and practices. This recommendation will be realized within the framework of the horizontal activity.

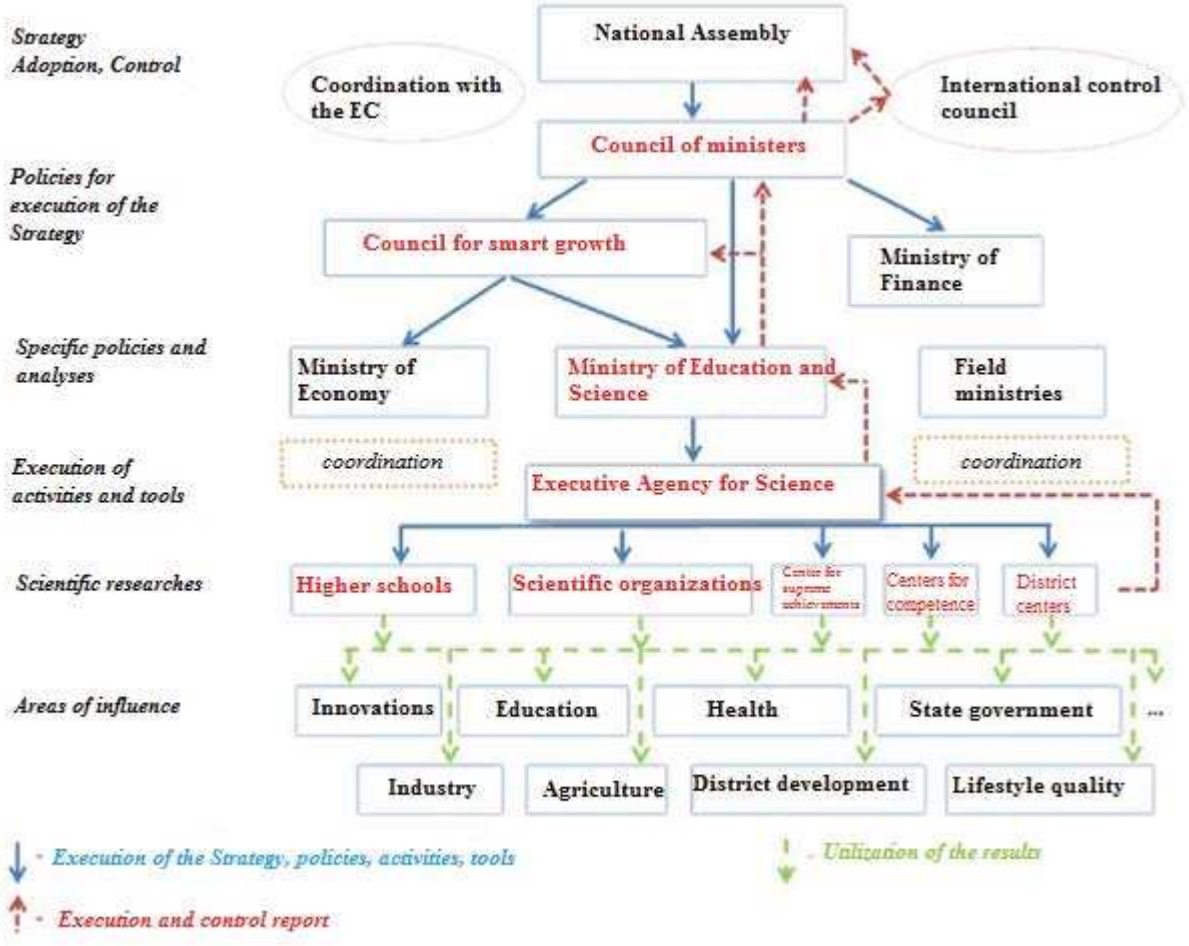
The reformation of the state structures for management and administration of the scientific researches will be realized through the establishment of Executive agency for Science within the Ministry of Education and Science. The Ministry of Education and Science will continue to execute the functions of a main body for formation of state policy in the field of scientific researches, and will present the national interests in the development of European programmes, related to scientific researches and will supervises the work of the agency. The scheme further in the text indicates the place of the Executive Agency for Science within the national system for scientific researches and in the implementation of the present strategy. The agency will perform management, support and monitoring of the activities, related to the science and research process in the scientific organizations and the higher schools.

For the implementation of the project financing functions, the agency includes National Science Fund, which will enlarge its activity towards programmes for financing of career development of the scientists, special and sectoral programmes for scientific researches, programmes for applied scientific researches, for development of the scientific centers, for international cooperation, support of the participation of Bulgarian scientists in international and European programs and others, indicated in the present strategy.

The Agency will implement methodical functions related to the application of the criteria for attesting of scientists and will organize the periodic evaluation of the scientific organizations.

Within the Agency, there will be established special support units for participation of Bulgarian teams in European programmes, for coordination of the activity of the main scientific centers and of the main scientific infrastructure. There will also be the coordination units with the National Innovation Fund within the Ministry of Economy and with specialized units of other field ministries.

The agency will also coordinate the activities for popularization of the science and the results from the scientific researches.



Scheme of the state authorities, that perform management of the scientific researches and their involvement for the execution of the strategy, reporting and control.

In red – main authorities for execution of the strategy.

4.4. Policy for development of human potential

The success of the strategy is related mainly to the provision of sufficient number of motivated and highly-qualified researchers. Neither developed infrastructure, nor increased financing, nor structural reforms or ambitious strategies will be effective without a competent scientists. It is also important to secure balanced distribution of the scientific potential according to age and gender, as well as according to scientific areas and geographic districts, including attracting Bulgarian scientists working abroad.

It is a critical point to attract to scientific career talented and motivated young people.

The specific goals, related to this policy are subordinated to the provision of high qualification of the scientists and establishment of work conditions, competitive to the ones in the other EU

countries, including through increase of the lifestyle standard and the social image of the scientists.

The differentiated remuneration is an important stimulus for the maintenance of a high scientific level of the researches, directly related to the scientific results achieved during a previous period (after periodic attestation).

The remuneration of the scientists must be high enough so that it can secure them a high social status. Therefore it is necessary to have an effective system for control of the quality of the scientific researches and the scientific level of the researchers. It is also important for the prevention of the occupation of scientific positions by unqualified persons – the scientist cannot occupy an academic position after more than one negative attestation evaluation.

The aim is the number of scientist in Bulgaria to reach the average level for the EU. Therefore it is necessary to establish new positions for scientists within existing scientific organizations and higher schools or in new research groups, institutes or centers. The enlargement of the existing organizations and the opportunities for establishment of new ones depends to a great extent on the policies for development of researches which are strategic for the country and their balance.

The goals, activities and measures, related to this policy are:

Specific objective 1. Provision of high qualification and effective career development of the scientists, based on high level scientific researches.

Activity 1.1. Introduction of minimal national criteria for scientific degrees and academic positions for the different scientific areas.

Main prerequisite for securing of a high level of scientific research and high competence of the scientists in Bulgaria is the development of a unified national mechanism for tracking of the career growth of the scientists and for the acquisition of scientific degrees which must correspond to unified minimal criteria valid for all scientific organizations in the country.

Measures

1.1.1. Development, acceptance and application of a legislation act (Low for the development of the Academic Staff) with minimal requirements for acquisition of scientific degrees and occupation of academic positions in the Republic of Bulgaria, conforming to the specifics of the different scientific areas and professional fields. The scientific criteria will be higher for researchers, working in science institutes, on account of criteria related to education activities in the higher schools.

1.1.2. Introduction of a system for administrative and public control of the execution of the minimal requirements based on the register of the scientific activity in Bulgaria.

Activity 1.2. Periodic attesting of the scientific organizations and the higher schools, conforming to the specifics of the individual types of science as well as periodical attesting of the scientists.

The implementation of an effective system for evaluation of the scientific and research activity is a component of each contemporary science policy. This system allows observation of the process of assimilating of the funds, the level of the execution of the science tasks and programmes and the results from the scientific activity. The evaluation allows to the state to analyze how effective was the scientific policy and to outline measures for its optimization based on comparability and co-measurement of the quality of the scientific and research activity with the global and European standards. In order to achieve high scientific results, it is necessary to stimulate those teams who implement high quality scientific activity. That is why it is necessary to periodically map the scientific achievements of the higher schools and research institutions and the best of them to be stimulated by the state. Simultaneously, it is necessary to take measures for these incentives to reach not only the institutions but the scientific teams and the individual scientists. This will be implemented through period attestation of the scientists in the scientific units and binding the reimbursement with the achieved scientific results.

For evaluation of the execution of the strategy in the beginning of the second stage of its implementation, it is planned to conduct an independent international evaluation of the scientific organizations and the research universities, which can provide recommendations for their development and for improvment the system for evaluation and attestation of the scientific organizations.

Measures

1.2.1. Development and application of a system for periodic attestation of the scientific organizations and higher schools, financed by the state budget. The system will be based on the internationally accepted scientific metrical indicators (reported scientific works, quotations, patents, project and etc.) as specific criteria will be worked out for each professional area and group of sciences.

1.2.2. Legislative obligation of the scientific organizations and higher schools, financed by the state budget to accept and apply the internal rules for attestation of their separate units, as well as of the scientists based on the attestation criteria of the institution.

1.2.3. Integration of the attested information and the attestation results with the information for the particular scientist and scientific organization in the Scientific Activity Register.

1.2.4. Adoption of an effective procedure for release of an academic position in case there is an unsatisfactory attestation result.

1.2.5. Adoption of an order for limiting or discontinuing of the financing of science units or organizations in case of unsatisfactory results from their scientific evaluation.

1.2.6. Conduction of an independent international evaluation of the scientific organizations – the institutes of the Bulgarian Academy of Science and Agricultural Academy, the scientific institutes

to ministries and departments and the research universities, according to the established international practices and the accumulated experience of the European commission bodies.

Activity 1.3. Increasing qualification of the scientists in the scientific organizations and higher schools.

The successful scientific activity is related with constantly increasing of qualification. Although this measure is related to all scientists and specialists, a special attention has to be paid to the qualification increase for young scientists and for scientists from institutions in areas with weak economic development.

Due to the expected decrease in the number of students during the first period of the strategy execution, it will be utilized for qualification increase of the scientists in the higher schools through broadening of the opportunities for specializations and provision of more time and funds for scientific research. This will lead to a significant increase of the scientific level of the scientists-teachers and respectively of the level of the higher school. Therefore the envisioned measures for this activity must be implemented as soon as possible. It is recommended that higher schools develop their own programs for increase of the qualification of teachers and decrease of the workload.

Measures

1.3.1. Development and implementation of programs for increase of the qualification of the regional scientists through specializations in leading science centers in the country.

1.3.2. Organization of competitions and provision of information for specialization programs in leading science centers in the country, Europe and other parts of the world.

1.3.3. Legislative regulation of the distribution of the workload of the scientists in universities, allowing them time, necessary for scientific research.

1.3.4. Legislative regulation regarding the utilization of leave (sabbatical) years for specialization/work of the scientists in a leading science center.

1.3.5. Supporting the participation of the scientists in science forums through project financing.

1.3.6. Inviting of world-famous scientists as lectors to national science institutions and giving the event broad centralized publicity.

Specific objective 2. Increasing the lifestyle standard and the social status of the scientists and specialists engaged with scientific and research activity, through securing of adequate and conformed to the achieved results payment, as well as good work conditions

Activity 2.1. Introduction of a system for differentiated payment to scientists, including two components: (1) main work salary – with fixed amount for the individual scientific positions, doctors and post-doctors in budget science organizations and higher schools and (2) additional material stimulation bound to particular scientific results.

The first component of the payment is differentiated according to positions. The minimal sum of the main work salary for each position will be defined according to the average work salary in the country for the previous year, and the salary of a chief assistant should exceed it.

It is also necessary to regulate minimal amounts for the additional payment for scientific degree.

The funds for provision of this payment will be secured as a component of the subsidy for the particular science organization or university according to the number of scientists on the respective position, who are eligible according to the legally regulated national criteria for the position or scientific degree. In case that the institution defines higher main salaries for particular positions they are not provided by the state budget.

The second component – additional payment will depend on the results of the attestation of the organization and of the individual scientists as well as on the realization of particular programmes. For achievement of a more significant effect it is necessary for the total amount of the second component on national scale to be not less than half of the total amount of component 1.

The funds for the second component also will be secured from the subsidy for the respective scientific organization or university. The organization should secure the distribution of the additional material stimulating according to the results achieved by the scientists.

Measures

2.1.1. Development and approval of a legislative act, regulating the minimal salaries of the scientists according to the respective positions, doctoral candidate and post-doctoral students in budget scientific organizations and higher schools as well as the additional payment for scientific degree and the updating mechanism.

2.1.2. Development of a system for definition of the distribution of the additional material stimulation funds for the scientists according to organizations based on the attestation results and the implementation of specific programs, envisioned in the strategy.

2.1.3. Annual inclusion in the state budget of the Republic of Bulgaria of the necessary funds to the subsidies of the respective organizations, securing the payment of the scientists in accordance to the acts in points 2.1.1 and 2.1.2.

2.1.4. Realization of control on behalf of the state and the social partners for correct and effective spending of the funds, provided through the subsidy for payment of the scientists, doctoral candidates and post-doctoral students.

2.1.5. Development of an attractive system for payment to the specialists and the specialized support staff, based on their qualification.

Activity 2.2. Improvement of the working conditions for scientists and specialists.

Working conditions in many scientific organizations and higher schools are far from the usual in the EU. In this respect, it is necessary to take urgent centralized and de-centralized .

Measures

2.2.1. Establishment of a joint committee with participation of social partners and competent authorities, reviewing the work conditions, which will suggest reasoned inclusion of purposeful funds in the budget of the respective organizations.

2.2.2. Approval of the establishment of new scientific units/scientific centers only if there are suitable work conditions available.

Activity 2.3. Increase of the social prestige of the scientist and of the scientific and research activity.

The increase of the social prestige of the scientist and of the scientific and research activity is related to giving suitable publicity of the work of the scientist. It is necessary for the society and the state authorities to realize the benefit from conduction of scientific researches in Bulgaria. That is why, this activity includes measures for popularization of science and scientific researches, putting an emphasis on the training of highly qualified professionals for the economics and administration, increase of the scientific culture of the society, on the contributions of science for understanding of world and humans as well as on the scientific approaches for solving of current challenges – ecological, technological, social, cultural, ethical and etc.

Measures

2.3.1. Development, approval and implementation of a program of the Ministry of Education and Science for popularization of science and scientific researches for the society with participation of leading scientists from the different spheres of science. The programme should be developed in tight cooperation with the major scientific institutions and research universities in the country.

2.3.2. Popularization of significant scientific achievements on the internet pages of the Ministry of Education and Science, National science Fund, Bulgarian Academy of Science, Agricultural Academy and higher schools and through social networks.

2.3.3 Implementation of legislative requirement for popularization of scientific research results, achieved through projects, financed by the state budget and EU funds, through modern communication media.

2.3.4 In the state media programmes - implementation and support of rubrics for increase of the scientific culture of the society and for scientific achievements.

2.3.5 Encouragement of the scientific organizations and higher schools to work for promotion of science and scientific researches amongst the society.

Specific objective 3. Increase of the number of scientists up to the levels characteristic for the EU and their balanced distribution according to age, gender, science fields and regions.

Increasing of the total number of scientists is a long-term strategic goal. The first step in this regard is to attract and detain talented and motivated young scientists, on which depends the future of research in Bulgaria. In addition to the urgent activities, envisioned for achievement of specific goal 1, the present specific goal envisions additional activities for attracting of young people to scientific researches. There are also envisioned activities, aiming at utilization the potential of the Bulgarian scientists working abroad and attracting them to work in Bulgaria.

Activity 3.1. Significant enlargement of the doctorate as a first step to scientific career

Particular care should be taken for attracting of qualified and young scientists in the fields where there is a critical minimum of scientists and even complete lack of scientists, as well as for better balance in the regional distribution of scientific centers in the country.

Measures

3.1.1. Legislative regulation of the minimum amount of scholarships for PhD students, comparable to the average salary in the country.

3.1.2. Providing of conditions for increase of the number of doctorates under state order, observing high criteria for the applicants and securing the necessary funds.

3.1.3. Providing of funds for conduction of the scientific researches and their presentation to science forums during the doctorate through purposeful subsidy of the respective scientific organization or university.

3.1.3. A requirement for successful tutoring of doctoral candidates to be included in the minimal national criteria for occupation of the academic position professor.

3.1.4. Legislative regulation of the administrative and financial responsibility of the scientific unit, the doctorate supervisor and the doctoral candidate for a doctorate that has not been defended up to a certain period after its termination.

3.1.5. Legislative regulation of doctorates, financed or co-financed by industry or private sources.

Activity 3.2. Involvement of more young people to doctorate and post-doctorate.

The opening of the borders stimulates many young people from the country to seek success abroad. Particularly this is relevant for doctorates and the reasons are not only in the high level

of a number of foreign scientific institutions but also in the better remuneration and the perspective for scientific work abroad. On the other hand, the term post-doctorate student, regardless being part of some programs, is not officially regulated in the legislative documents.

Measures

3.2.1. Legislative introduction of the position “Post-doctorate student” in the National classification of professions and positions and support for opening of such positions in the scientific organizations and higher schools.

3.2.2. Regulation of the requirements and the ways for conduction and financing of the post-doctorates.

3.2.3. Recovery and updating of the programmes/schemes for financing of the doctorates and post-doctorates through projects of the applicants or the admitting organizations, including through utilization of the opportunities given by European and international programmes. Regulation of a fast procedure for selection of doctoral candidates and post-doctoral students with provided project financing for the period of the doctorate/post-doctorate. The project supervisor has leading role in the selection process

3.2.4. Ensuring of the existing ones and provide of additional social benefits for doctoral candidates and post-doctoral students.

3.2.5. Regulation of the utilization of part of the subsidy for scientific research and artistic creative activity of the higher schools for stimulate the participation of students in scientific project activities.

3.2.6. Providing of specialized courses for doctoral candidates and post-doctoral students that will be beneficial to them if they continue their career in a scientific organization, university, industry, administration etc.…

3.2.7. Providing of specialized courses in Bulgarian language for foreign doctoral candidates and post-doctoral students.

Activity 3.3. Attracting of young doctoral candidates for scientific work in the country.

Many young people, interested in science, find realization abroad or in other social spheres. Main reason for this is the low payment. Even with successful realization of the present strategy the base payment of a newly admitted young scientists is relatively low and they are not eligible for additional material stimulation due to lack of previous results. Therefore it is necessary to take special measures for attracting of young people to scientific career. This can happen through additional material stimulation in the early stages of the scientific career and through securing of attractive perspectives for career growth.

Measures

3.3.1. Maintaining and expanding competition for projects of young scientists in the scientific organizations and higher schools and National Science Fund.

3.3.2. Change the procedure for conducting competitions for assistant professor on the basis of scientific results of the candidate, including thesis without conduction of contest examination.

3.3.3. Providing career development subject only to the results of research.

Activity 3.4. Implementation of joint research together with Bulgarian scientists abroad and attracting leading scientists from other countries

One of the few positive outcomes of the flight of talented students and scientists from Bulgaria towards various parts of the world over the last quarter of a century is the emergence of a **strong Bulgarian scientific diaspora abroad**. Bulgarian scientists are currently working in leading research and development centres in Europe, America, Asia, Australia . Many countries effectively use the potential of their scientific diasporas for both research and development and also for preparing students and PhD students.

The measures included in this activity are aimed at providing conditions for utilizing the potential of the Bulgarian scientific diaspora abroad for the purpose of achieving the objectives of the strategy. One of the main aspects in this direction is a programme for working with the Bulgarian scientific diaspora abroad, which includes the mechanisms listed below. This programme shall include provided funding or co-funding of the respective activities, programmes and projects.

Measures

3.4.1. Development and implementation of a programme for working with the Bulgarian scientific diaspora abroad with provided funding or co-funding.

3.4.2. Development and implementation of projects for reintegration encouraging the return to Bulgaria and the involvement in research and teaching activities of highly-qualified Bulgarian scientists working in various scientific institutions abroad.

3.4.3. A scheme for maintaining contacts and exchanging information with scientists; a programme for periodic visits of Bulgarian scientists from abroad to the scientific organizations or universities in Bulgaria in order to establish contacts or conduct certain specialized lecture courses for young scientists, PhD students and students.

3.4.4. Regulating the possibility for partial appointment of a Bulgarian scientist from abroad in a Bulgarian scientific organization or a university for a limited period of time.

3.4.5. Regulating doctoral or post-doctoral studies under the joint supervision of a Bulgarian scientist from abroad and a scientist from a scientific organization or a university in Bulgaria.

3.4.6. Introducing a scheme for joint scientific projects between Bulgarian scientists from abroad and scientists from a scientific organization or a university in Bulgaria.

3.4.7. Adopting some normative changes facilitating the involvement of highly-qualified foreign scientists in research and teaching activities in Bulgaria.

Activity 3.5. Stimulating more balanced regional allocation of the scientific potential

What is typical of our country is the concentration of the scientific potential in the capital to a large extent, which does not correspond to the policy for balanced regional development. An important step in the process of stimulating the regional development of the research will be the establishment of important regional scientific centres intended for applied research that will have a critical number of scientists, which will serve as a core for the development of the research in the separate regions.

Measures

3.5.1. Target schemes for improving the qualification of scientists in existing or newly-established regional scientific centres in the leading scientific centres around the country in the respective scientific area.

3.5.2. Regulating the establishment of strategic partnerships between regional scientific centres and leading scientific centres around the country for joint scientific studies, joint doctoral and post-doctoral studies, conducting specialized courses for improvement of the qualification and others.

3.5.3. Stimulating more balanced allocation of the scientific potential by providing preferences of the respective regional administrations or municipalities.

This information is available online:

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Last access: 29 November 2017: http://horizon2020.mon.bg/?h=downloadFile&fileId=436