

PD-ABY-241



QUARTERLY REPORT

November 2002-February 2003

**ПРОЕКТ
ОПАЗВАНЕ НА БИОЛОГИЧНОТО РАЗНООБРАЗИЕ
И ИКОНОМИЧЕСКИ РАСТЕЖ**

**BIODIVERSITY CONSERVATION &
ECONOMIC GROWTH
PROJECT**

**Biodiversity Conservation & Economic Growth
(BCEG) Project**

QUARTERLY REPORT

November 2002-February 2003

Submitted by:

**Peter Hetz
Senior Team Leader
ARD, Inc.**

Bulgaria Biodiversity Conservation and Economic Growth Project

is a collaborative initiative between the

**United States Agency for International Development
and the
Government of the Republic of Bulgaria**

implemented by
Associates in Rural Development, Inc.

Project Number LAG-I-00-99-00013-00, Task Order 01

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Acronyms

ARD	Associates in Rural Development, Inc.
BAS	Bulgarian Academy of Sciences
BCEG	Biodiversity Conservation and Economic Growth Project
BNR	Bulgarian National Radio
BSBCP	Bulgarian-Swiss Biodiversity Conservation Program
BTA	Bulgarian Telegraph Agency
CBNP	Central Balkan National Park
CHM	Clearing House Mechanism
COM	Council of Ministers
CPT	Core Planning Team
CRP	Contract Results Package
CTO	Cognizant Technical Officer
EEA	Executive Environmental Agency
EU	European Union
FLGR	Foundation for Local Government Reform
GCF/CI	Global Conservation Fund/Conservation International
GDA	Global Development Alliance
GEF	Global Environment Facility (note the acronym "GEF" is also used generically in Bulgaria for the USAID/GEF Biodiversity project)
GIS	Geographic Information System
GOB	Government of Bulgaria
GTZ	German Agency for Technical Cooperation
IBA	Important Bird Areas
IQC	Indefinite Quantities Contract
HQ	Headquarters
LGI	Local Government Initiative Program
LOE	Level of Effort
MOAF	Ministry of Agriculture and Forests
MOE	Ministry of Economy
MOEW	Ministry of Environment and Waters
MORD	Ministry of Regional Development
MOU	Memorandum of Understanding

MP	Management Plan
NEN	National Ecological Network
NETS	National Eco-Tourism Strategy
NFB	National Forestry Board (with MOAF)
NGO	Non-Government Organization
NNPS	National Nature Protection Service (of MOEW)
NP	National Park
NPD	National Park Directorate
NTEF	National Trust Eco-Fund
NTFP/NTNR	Non-Timber Forest Products/Non-Timber Natural Resources
PCT	Project Counterpart Team
PHD	Program and Human Development
PMU	Project Management Unit
PS	Park Section
PTF	Pirin Tourism Forum
PTP	Participant Training Program
REC	Regional Environmental Center
RIEW	Regional Inspectorate of Environment and Waters
RMNP	Rila Monastery Nature Park
RNP	Rila National Park
SDC	Swiss Development Agency
STTA	Short-Term Technical Assistance
TOR	Terms of Reference
TV	Television
UD/FLAG	University of Delaware/Firm Level Assistance Group
UNDP	United Nations Development Program
USAID	United States Agency for International Development

Preface

The Biodiversity Conservation and Economic Growth (BCEG) Project is funded by the United States Agency for International Development, (USAID), as part of its strategic support to the Republic of Bulgaria. The Project is sponsored by USAID in conjunction with the Government of Bulgaria – the Ministry of Environment and Waters (MOEW). The Project is governed by a Memorandum of Understanding (MOU) between the two governments, and its implementation covers the period: **May 2000 – March 2003**.

This Project is a logical evolution of earlier USAID assistance to biodiversity conservation in the country. It follows some 10 years of assessment, technical assistance and financing of Bulgaria's biodiversity conservation strategic development, new protected area legislation, and new national park institutions. The Project is designed to capitalize on the achievements of the Bulgaria Global Environmental Facility (GEF) Biodiversity Project (implemented during the period June 1995-April 2000), and builds on lessons learned.

The BCEG Project addresses six specific contract themes known as tasks or "contract result packages". The BCEG Project includes the finalization and implementation of two national park management plans, the development of a new management plan for Rila Monastery Nature Park. It assists in the development of financial mechanisms and strategies to ensure the solvency of national parks. The Project pilots economic growth activities with select target groups around two Bulgarian national parks. And it continues to build on the principles of strong public information and awareness as stepping stones for informed public engagement and promotion of biodiversity conservation and protected area management activities.

This Project is issued as a Task Order (Contract Number LAG-I-00-99-00013-00) under the USAID Global Biodiversity and Forestry Indefinite Quantities Contract (IQC); and is implemented on behalf of USAID by Associates in Rural Development, (ARD) Inc., of Burlington, Vermont, USA.

The Project is implemented through a Project Management Unit (PMU) based in Sofia, and includes a Team Leader, three Bulgarian technical specialists, and support staff.

Project activities are coordinated through two mechanisms –

- (a) Project Coordination Group – serves as a steering committee for Project planning and monitors implementation. This consists of the National Nature Protection Service of the MOEW, and national park directors, the PMU and USAID.
- (b) Project Counterpart Team – PMU staff working with MOEW/NNPS counterparts

The Project is largely implemented through the Directorates for Rila and Central Balkan National Parks. Additional technical assistance is provided by Bulgarian and international consultants, and is based on specific terms of reference.

1.0 Introduction

BCEG Project activities are guided by a life of project work plan, implemented through an annual work plan. Reports regarding progress are required quarterly, and annually. This **Quarterly** report covers the period **November 2002-February 2003, four months instead of three, in anticipation of an end of Project report.**

1.1 Project Supervision

USAID manages this contract through a project officer, Alicia Grimes, Cognizant Technical Officer (CTO), based in Washington D.C., EGAT – Bureau of Natural Resources Management, Europe and Eurasia/Forestry. The BCEG Project however, is one aspect of the USAID Mission to Bulgaria's "Special Initiatives and Cross-cutting Programs". This unusual management structure is historical. Traditionally, the Project has also been supported and overseen by the Mission's PHD, in Sofia.

The USAID Mission to Bulgaria appointed an Environment and Natural Resources Specialist to its staff in March 2001. Among other program duties, the Specialist represents the Mission's interests to the Project, and is now a direct point of contact to the Mission's country program.

During this reporting period, Ms. Grimes returned from maternity leave in December, just before Christmas. She reassumed her CTO responsibilities. Mr. Jay Lee, USAID-Bulgaria, Mission Environment Officer departed Bulgaria during this period. His duties were assumed by Assia Alexieva, USAID-Bulgaria, PHD department. Thanks to Mr. Gerald Gold in USAID Washington D.C., for his help during Ms. Grimes' maternity leave.

1.2 Bilateral Agreement

A Memorandum of Understanding is the formal tool governing the working agreement between the Governments of the United States of America and the Republic of Bulgaria. The MOU was signed between the Governments of the USA and the Republic of Bulgaria, on November 30, 2000. The Memorandum reflects the respective commitment of each Government to the successful implementation of this Project.

An amendment to the MOU was requested in December of 2000, in order to reflect changes to a critical timetable in the agreement. ***An instruction/amendment from USAID to the Government of Bulgaria regarding the Project's extension was completed during this reporting period.***

1.3 Project Coordination – Steering Committee

The Project is guided and reviewed on a regular basis by a Project Coordination Group – steering committee. This group is comprised of the PMU Technical Team, the Directors of both National Parks supported by the Project, a representative of the National Nature Protection Service (NNPS), and a USAID representative. ***A project coordination meeting was held during this reporting period, to examine the activities completed to date, and to review***

the action plan for the no-cost extension period. Mr. Jay Lee was unable to attend due to his impending departure and other tasks.

1.4 Project Counterparts

As required in the MOU, a Project Counterpart Team (PCT), was assigned in December of 2000. The counterpart team addresses the specific assignment of nationally based representatives of the Ministry of Environment and Waters, National Nature Protection Service, to specific tasks of the Project. These team members ensure more regular contact, joint project development, and communication with the Ministry.

Conservation, Protected Areas, and Management Planning	Mihail Mihailov
Eco-Enterprise	Raina Hardalova
Public Awareness	Diana Iskrevva
Counterpart Team Leader	Hristo Bojinov
Counterpart within the Ministry	Dep. Min. Iliaz

1.5 Work Plan and Contract Results

The Work Plan is developed in response to the Project contract and its tasks. Each task is accomplished through a set of sub-tasks. The PMU has organized these tasks and sub-tasks in logical clusters supporting a hierarchy of expected results. As a consequence, we report on six contract results packages – or distinct project themes. These include:

- Contract Result Package 1* Finalize Management Plans for Rila and Central Balkan National Parks, and deliver to the Council of Ministers
- Contract Result Package 2* Effective Management and Priority Actions of Management Plans Supported
- Contract Result Package 3* Park-Related Eco-Enterprises Demonstrated for Ecotourism and Natural, Non-Timber Resources Collection
- Contract Result Package 4* Mechanism for National Park Financial Sustainability Established
- Contract Result Package 5* Rila Monastery Nature Park Management Plan Prepared
- Contract Result Package 6* Public Awareness and Promotion Campaigns Implemented

Additional reporting themes are related to Project management and coordination, Networking and Partnerships, Special Project Issues, etc.

N.B. A no-cost extension was approved for this Project, in October. The End of Project contract date has been extended until March 31, 2003. The new application for a no-cost extension was submitted in February of 2003. A new Project end-date is proposed for June 30, 2003.

2.0 Results Framework

The aim of the Project is to contribute to the improved institutional framework and capacity for protected areas management in Bulgaria with benefits to communities surrounding key protected area sites.

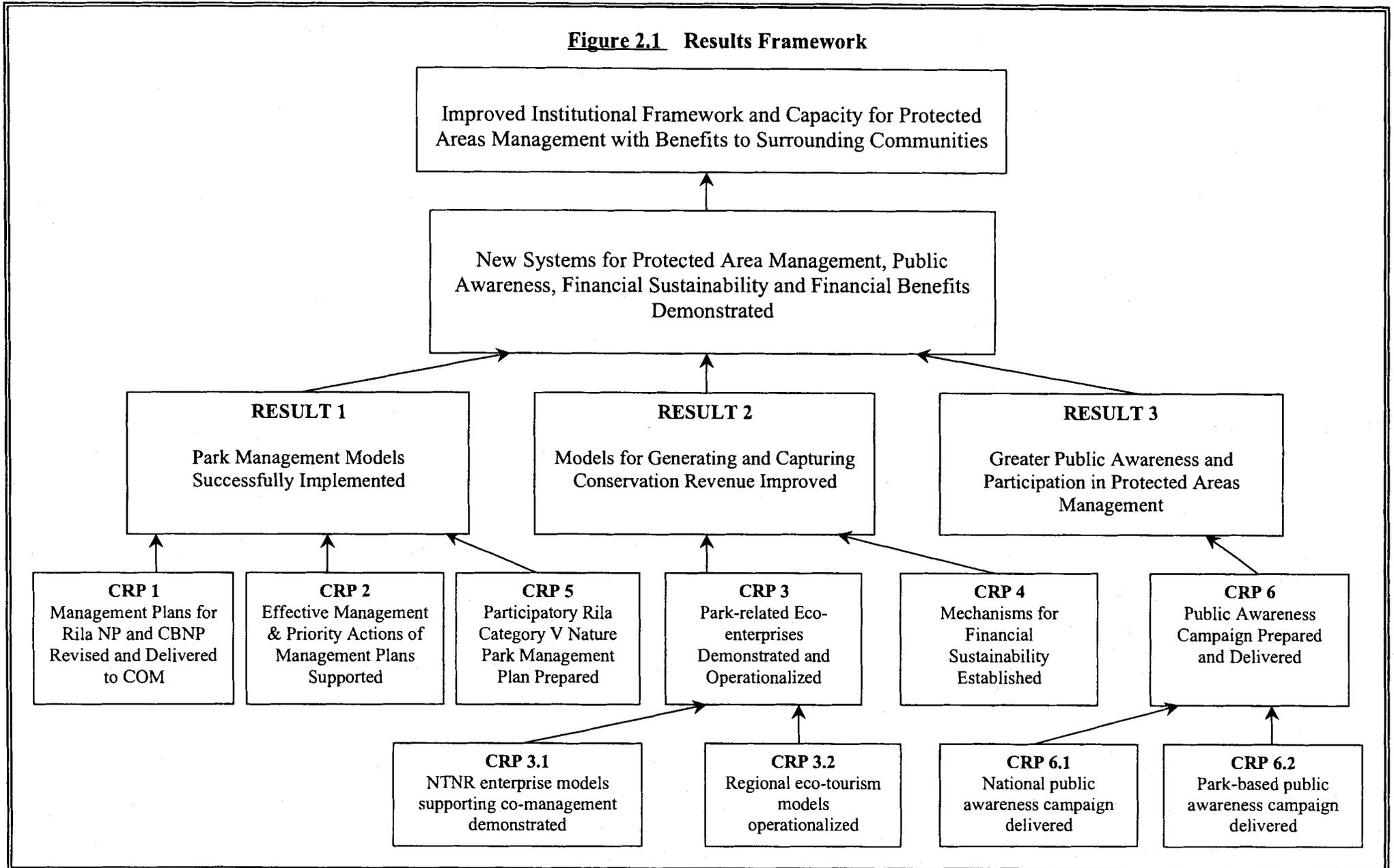
A secondary objective is to demonstrate new systems for protected areas management, public awareness, financial sustainability and financial benefits. In order to achieve this hierarchy of objectives, the Project supports **three direct results**, or outcomes:

- Park management models are successfully implemented
- Models for generating and capturing biodiversity conservation revenue are improved; and,
- Greater public awareness and participation is demonstrated in protected areas management

Project reporting is guided by the six results packages. Our annual report uses the six results package to account a set of activities covered by the reporting period, and quantifies results/activities. A narrative also describes constraints to achievement of project targets.

The Project's results are illustrated below.

Figure 2.1 Results Framework



3.0 Planned Activities

Result 1 Park Management Models Successfully Implemented

This result is supported by three (3) contract results packages. Protected area management models continue to be developed through five major areas of support – and each is related to activities and themes of this Project. The five areas include:

1. Support for development of an enabling environment (Legislative Framework);
2. Management Planning – an interactive process conducted by a multi-disciplinary team;
3. Management Plan implementation – Technical and financial support for implementation of protected area (Park) programs and projects that are identified and approved in the Management Plans;
4. Technical training and capacity building at Park level; and
5. Public awareness and information

Park management models for Bulgaria have many important indicators of success. For the purpose of reporting at the level of Strategic Objective for USAID-Bulgaria, we have selected the following indicators of successful park management model implementation:

Number of contemporary protected area management practices adapted and implemented by Bulgarian National Park management.

“**contemporary management practices**” are defined as a “a set of recognized international protected area management approaches that include: conservation biology, habitat conservation, management zoning, tourist management, visitor interpretation and education, conservation management in a regional and landscape context, revenue generation, and work with surrounding communities to provide education and economic benefits”.

“**adapted and implemented**” are defined as “provided for in general management plans, developed in sufficient detail to effectively budget for, allocate personnel, and implemented on a pilot basis or incorporated into an operational system for the national park(s)”.

We consider the following management categories an indication of success, and monitor these activities with National Parks accordingly:

- Natural resource management activities implemented
- Tourist management and infrastructure projects implemented
- Interpretation and education programs established for tourists
- Local partnerships developed and nurtured
- Park Administrative Systems functioning
- Revenue Generating Project/activities implemented; and,
- Nature park management plans developed and approved.

Each one of these park management themes contains a number of representative projects/activities. For example:

“Natural resources management activities implemented”, would include:

- establishment of an ecological monitoring program;
- fire management and mitigation plan
- medicinal plants management plan

In order to continue our support to the development of these successful models, we are engaged in the following tasks – expressed as *results packages* – sets of tasks and sub-tasks that contribute to successful implementation of park models.

CRP 1 Management Plans for Rila and Central Balkan National Parks Revised and Delivered to Council of Ministers for Approval

Indicators	Target	Actual 4/02
Number of management plans revised and submitted to COM	2	2
Number of public hearings (programs) conducted in support of management plan approval	2	2

The set of activities under this contract result has been finalized. USAID Bulgaria and USAID Washington D.C., are in receipt of official copies of the approved Management Plans for Rila and Central Balkan National Park, in both hard copy and electronic (CD) formats.

CRP 2 Effective Management and Priority Actions of Management Plans Supported

Indicators	Target	Actual 4/02
Number of annual operation plans guiding park management plan implementation*	4	4
Number of multi-year action plans guiding implementation of park management plans	2	2
Number of projects implemented per park management theme (5 per park)	10	14
Rila	5	7
Central Balkan	5	7
Number of public awareness strategies prepared and implemented during two year period	2	2
Number of training courses conducted in support of protected area management:		
✓ Rangers	10	6
✓ Park technical staff	7	6

* life of project target

** gray area added to qualify the difference in operations planning. Each park produced a three year action plan as part of its 10-year management plan.

Legislative Development and Policy Reform

There are no further legislative actions or reforms regarding primary legislation supported by this Project during the reporting period. Instead, the efforts of the Project focused on secondary legislation (orders and regulations). Draft legislation related to parks procurement of goods and services for concessions, and changes to the Medicinal Plants Act regulation government medicinal plant quantities have been developed during this reporting period. Action is expected on these items by the MOEW in April and May of 2003.

Management Plan Implementation

Management plan approval in 2001 signaled an investment of USAID and GOB funds into capital development projects in both Parks. Earlier discussions with both Park Directorates and NNPS ensured that USAID project funds were coordinated with capital development funds available from the new *National Enterprise Fund for Environmental Management* formerly an extra-budgetary fund of the MOEW. From January 2002, the Fund became a budgetary fund in response to fiduciary changes in Government's use of extra-budgetary items. In January 2003, the Fund became a "parastatal" fund (a public-private enterprise) organized for the expenditures of money accruing from environmental taxes and fees.

Annual Operations Plans, developed with BCEG Project technical advice, serve to guide park activities and capital investment.

All park investment projects supported by the BCEG Project/USAID funds were completed during this reporting period, except for the project on the development of a medicinal plants sustainable management data base. This project will be completed by the end of April, 2003.

A summary of all park projects supported by USAID funding is listed in **Appendix 1** to this report. Each project is supported by full documentation of project activities, project chronology, local contracts, expense reports, end-of-project reports, and examples/evidence of work complete.

Geographic Information System for both National Parks, and the NNPS

Digital Models and Maps - GIS

The data bases that support the management of medicinal plants allowed for commercial collection in RNP and CBNP have been developed and submitted for expert review during this reporting period. The testing of these databases will be completed during March of 2003. These are the first park data bases for commercial medicinal plant locations and form the basis for management regimes, conservation measures, and harvest quotas for each national park. These are the basis for long-term sustainable management, monitoring and harvesting of commercial plant species.

Illustrative maps at a scale of 1:100 000 have been produced. They indicate the localities of medicinal plants species allowed for commercial collection in RNP and CBNP. These maps have been produced using data collected and tabulated in each Park's medicinal plants data base. The data base for each Park includes tables for each Park Section (administrative and

management unit) Each table is further divided into attributes for each of the known locations of medicinal plants within each park section. Maps produced using these attribute data will be finalized during March 2003.

The latest digital models provided by the Rila Municipality Land Commission are erroneously based on the Agrolesproject Forest Inventory from 1990. This means that the cadaster for Rila Municipality and Rila Monastery is still inaccurate. The Project has again registered an official concern with the Ministry of Agriculture and Forests, Department of Land Registration, to obtain a properly updated version of the cadaster for Rila Monastery, and Padala and Pastra Villages. Delays in provision of the official cadaster for the Rila Monastery Nature Park will cause a delay in the production of the final digital model of the Nature Park. We are withholding the final production of 1:25,000 scale maps, until the land cadaster has been reconciled with the natural resource base (forestry inventory) received from the MOAF Agrolesproject. We are however, preparing the illustrative map sets (13 individual map illustrations using the Project's Nature Park data base), based on the information supplied by the GOB. This matter eventually affects the final land cadaster of the Nature Park and its boundaries.

Inaccuracies in the Rila Monastery Nature Park digital model will be corrected when the Project is provided with the official, corrected cadaster for the Nature Park territory. We expect to receive the corrected cadaster information within the next two months.

Consultant Support

The Project retains the technical services of a GIS consultant. Mr. Ivan Kountchev, as a GIS advisor to NNPS and Parks. Mr. Kountchev has provided expert services for the conversion of the land files from Rila Municipality to a format that is compatible with the database of the Nature Park. Conversion allows the files to be compared and disparities between geo-referenced fields to be analyzed. Land file conversion is based upon a "conversion formula" developed by Mr. Kountchev with the financial support of the Project. It has been provided to the Ministry of Environment and Waters to allow for regular dialog and comparison of land files between the formats used by contractors in the MOAF, with technical GIS specialists within the NNPS/MOEW.

Ecological Monitoring

The framework and select methodologies for the national system of ecological monitoring within Bulgarian National Parks were largely completed during this reporting period. The BCEG Project has played an important role in facilitating the development of the national parks ecological monitoring system policy and institutional working relationships between the MOEW/NNPS, the three national parks, and the Executive Environmental Agency (EEA). The EEA is the repository for all environmental monitoring in the country, including biodiversity indicators and park monitoring data.

Technical Subject Matter Monitoring Methodologies

The following methodologies have been developed and preliminary workshops for Park staff organized for the purposes of orientation and information sharing on each of these

methodologies. More rigorous, formal training in the use of methodologies will not be conducted until these methodologies are approved for use by the NNPS and the EEA. Subject-specific methodologies are based on species and habitats that are indicators of tourism impact, ecosystem health and/or are representative of endangered species and populations.

1. Forest Monitoring
2. Bird Monitoring
3. Medicinal Plants
4. Bear Monitoring
5. Souslik (ground squirrel) monitoring
6. Tourism Impact Monitoring and Limits of Acceptable Use

There are several methodologies to be employed in each national parks ecological monitoring program that have not yet been developed and approved. These include:

1. Soils
2. Precipitation
3. Water Quality
4. Grazing impacts
5. Habitats of conservation importance
6. Several species of conservation significance (deer, chamois, wolf) and several small vertebrates of high conservation significance, including specific frogs, bats, rodents, and fish.

Training

Training of the park staff by Ass. Professor G. Kostov (Forestry University, Sofia) on processing and analyzing the data collected in implementation of the Methodology for forests monitoring in the national parks:

RNP – Blagoevgrad; Date: 12 December; Participants: 2 expert, 3 park section heads
CBNP – Gabrovo; Date 9 –10 December Participants: 2 experts, 2 park section heads

Methodology for monitoring of the brown bear in RNP and CBNP finalized by the consultant Raicho Gunchev. Field orientation of select park staff in implementation of the methodology was carried out:

RNP – 7-8 November 2002, Semkovo; Participants: 2 experts, 5 section heads, 1 ranger
CBNP – 15-16 November 2002, Mazalat chalet; Participants: 2 experts, 6 rangers

Methodology for monitoring of the European souslik (*Spermophilus citellus*) in RNP and CBNP developed by Ass. Professor Vladimir Stefanov (Sofia University). Training of the park staff on implementation of the methodology – Sofia University, Biology Faculty, 06 February 2002. Participants:

CBNP – 1 expert, 4 rangers
RNP – 1 expert, 2 rangers

Workshops and Meetings

A National Workshop was conducted in January of 2003. Its purpose was to review the assumptions, methodologies, framework, and institutional roles in a national parks system of ecological monitoring.

16 January 2003, Sofia, Second Workshop on Development and implementation of ecological monitoring system in the National Parks

Participants: NNPS - 5 representatives; Rila National Park - 5 experts, Central Balkan National Park - 7 experts, Pirin National Park - 2 experts, Executive Environmental Agency - 3, three Regional Inspectorates - 4 experts, 7 authors of the methodologies for monitoring .

Materials: Presentation of the Report for Development and Implementation of an Ecological Monitoring System in the National Parks including the ecological monitoring matrices (frameworks) for CBNP and RNP.

Set of the full texts of the methodologies for monitoring developed under the BCEG Project (monitoring of forests, monitoring of bear; monitoring of European souslik; monitoring of birds; monitoring of tourism impacts; phenological monitoring of medicinal plants).

30 January 2002, Sofia, Working meeting with experts of the three National Parks (Svetoslav Todorov, Verka Ivanova, Ivajlo Ikonov) to review and complete the monitoring matrices proposed for monitoring each national park.

20 February 2002, Working Meeting in the EEA, Sofia, on the development and implementation of ecological monitoring system in the National Parks. A memo of this meeting is attached as **Appendix 2** to this report.

CRP 5 Rila Monastery Nature Park Management Plan Prepared

Indicators* (life of project)	Target	Actual 4/02
Number of stakeholder workshops	5	5
Number of public awareness events held in support of management planning	3	2
Number of management plans prepared	1	0

The final draft of the Rila Monastery Nature Park (RMNP) Management Plan is almost complete. Final proof-reading of the Bulgarian and English texts are expected to be completed by the end of March 2003. Map illustrations will be completed at the end of the same month. We anticipate completion of the Park's digital model and production of 1:25000 scale maps for the Plan will be completed by April 15-30, 2003.

Record of Planning Activities and Events

Activity	Dates	Participants/Comments
Meeting attendance in Ministry of Regional Development (MORD) on discussion of the status of the illegal buildings on the territory of RMNP belonging to the Church.	28.11.2002	MORD, MOAF, MOEW (including Iliaz, Plugchieva), National Service on control of illegal construction, Holy Synod representatives
1:25000 scale vegetation habitats map of the RMNP prepared by Dr. Russakova, Institute of Botany, BAS. The map is currently under digitization.	December and January	This is a special requirement of the Terms of Reference for the Park Management Plan. It requires classification systems new to Bulgaria.
First version of 11 thematic, illustrative maps of RMNP produced by BCEG Project sub-contractor, GeoHIDE, submitted, reviewed, and corrected.	January and February	These maps are the first to be produced using the data base and digital model compiled by the BCEG Project over the last year.
4 Core Planning Team meetings were conducted during this reporting period. CPT meetings are used to review draft management plan material, review draft maps, and develop each section of the management plan.	6 November, 2002 21 January, 2003 28 January 14 February	
<i>Management Concept Development</i> Preparation of a Management Concept for the territory of the RMNP with MOEW and MOAF technical experts and Director of Ecclesiastical Matters, Council of Ministers Meeting with NNPS Meeting with NNPS, MOAF Working dinner with Director of Ecclesiastical Matters Meeting with the Holy Synod representatives Meeting with NNPS in our office	December 6 22 January January 25 20 February 26 February	

Management Concept for the Future of Rila Monastery Nature Park

With the blessing of the MOEW and MOAF, the management concept for the Nature Park was moved forward and is being formally considered. These events were in part triggered by the release of a letter from the Bulgarian Orthodox Church Synod in early October, 2002. The letter is addressed to the Prime Minister and reflects the Church's desire to take an active role in the future management of its lands within the Park. The Synod's letter represents the first formal engagement of the Church expressing a desired outcome regarding the management plan and its implementation. The most recent version of the Management Concept is attached as **Appendix 3**.

The BCEG Project is responsible for drafting a response (management concept). The response will be formally authored by the MOEW once discussions are completed with the Synod and its legal advisors.

The management model concept paper has been reviewed in a number of meetings with the MOEW (Mihailov), with MOAF (Plougchieva, Tinchev and Marinkovski), and the Directorate of Ecclesiastical Matters (Jelev and Krustev). The results of these meetings indicated that there is general consensus regarding the need for a new model for the management and administration of the Nature Park, made more urgent by the position of the church.

The BCEG Project continues to coordinate development of the new management model concept. A new form of management body (a council or board) must be developed and put in place to address stakeholder interests in the Park's future and to ensure effective implementation of the Park's management plan.

A special task force has been formed and organized with BCEG Project support to address this matter. It consists of the MOEW, the MOAF and the Department of Ecclesiastical Matters. The team met for its first meeting on October 22, 2002, to draft a response to the Synod's letter to the Prime Minister, and to consider the management structure and TOR in greater detail.

A revised draft management structure and TOR was developed by the BCEG Project in December, and reviewed repeatedly during this reporting period. The two most significant changes to the original draft management concept are:

- (1) to move away from development of a land trust (as participants in the concept's development believe such a move to be premature in Bulgaria); and
- (2) to remove all mention of financial information and fiscal responsibility in the Management concept until both parties are present at the table at the same time.

The latest version of the management concept for the Nature Park reflects the most recent meeting with Bulgarian Orthodox Church representatives on February 20, 2003. The management concept has been submitted by the Project, to the Church, for official review and reaction. Official negotiations on the management concept are expected in April, with both parties in the room.

Short Term Technical Assistance

No additional international short-term technical assistance was employed during this reporting period.

4 local consultants work as the Core Planning Team (CPT) for the Rila Monastery Nature Park Management Plan. They are Dr. Dimitar Peev, Dr. Petar Yankov, Ms. Snezhana Kostadinova, and Mr. Ventsislav Velichkov. They are assigned to the management plan's development throughout the process of its completion. Ms. Kostadinova returned from English language training in the United States in December, and reassumed her role in the CPT.

Result 2 Models for Generating and Capturing Biodiversity Conservation Revenue are Improved

Introduction

This result is supported by two result packages – **eco-enterprise**, and **innovative financial mechanisms**.

The activities selected as part of **eco-enterprise** have been developed using contributions from both national park directorates. These pilot activities support models and are test cases within, and outside National Parks. Most were determined during management planning for both parks, and with the information collected from three years of socio-economic surveys. We believe that two eco-enterprise themes represent the best opportunity to:

- Maximize the partnerships between National Parks and their local, municipal constituencies;
- Address very real needs as expressed by local community members;
- Directly relate park management objectives that stress nature conservation **and** provide benefits to local communities;
- Generate direct income and support enterprise development in target communities selected with National Parks;
- Coordinate in-service staff development, technical specialization, and project results with the roles of Park Directorates.

The BCEG Project is supporting the development of pilot activities addressing **ecotourism**, and **non-timber natural resources collection**.

The BCEG Project continued to work with Bulgarian subject matter specialists during this reporting period. They act as intermittent technical advisors to the pilot areas. Subject matter specialists (one for ecotourism, and one for non-timber natural resources) continue to provide advice and technical direction for the remaining life of the Project.

CRP 3 Park-Related Eco-Enterprises Demonstrated for Ecotourism and Natural, Non-Timber Resources Collection

Indicators for NTFP/NTNR (CRP 3.a)	Target	Actual 4/02
Number of NTFP/NTNR groups formed	2	2
Number of areas managed by co-management agreement	2	2
Number of training events delivered	5	2
Number of park-based regional consultative workshops	2	4
Number of income-generating projects	2	NB
Indicators for Eco-tourism (CRP 3.b)	Target	Actual
Number of eco-tourism forums (initiative groups) developed	2	2
Number of eco-tourism strategies prepared	2	
Number of eco-tourism projects demonstrated	2	

NB Implementation of these tasks resulted in a considerable shift to the Project's small and medium enterprise strategy.

3a. Non-Timber Natural Resources (NTFP/NTNR)

- ◆ Three meetings of the NTFP/NTNR national parks working group were held to analyze the results of the bilberries (*Vaccinium spp*) harvesting campaign of 2002, and to develop regulatory proposals for changes to laws. They also were used to prepare for the national working meeting on NTFP/NTNR policy in National Parks, conducted in December of 2002.
- ◆ One workshop with the three National Parks was held (14 November 2002) to analyze the results of the campaign and to prepare for the national workshop. The workshop was attended by the directors, medicinal plants experts and parks section heads of Rila and Central Balkan National Parks and the Director, and the medicinal plants expert of Pirin National park. The results of this workshop were:
 - Analysis and description of lessons from the campaign in the two national parks (reflected in the final BCEG report);
 - Proposed changes to the national legislation to be reviewed and discussed at the national working meeting;
 - Agreed actions to be incorporated in the 2003 annual plans of the National Parks including replication and expansion of the model developed through the pilot project.
 - For Rila National Park, they propose to expand the model for bilberries management to the whole Park. In addition, they will apply the same model of collaborative non-timber natural resources management to the harvest of mushrooms from the Park.
 - For Central Balkan National Park they will expand the model for the collaborative management of bilberries and cowberries (*Vaccinium spp*) to the whole Park. Both these proposals form part of each Parks Annual Operations Plan, and will be supported by the MOEW budget for recurring expenses, and partly funded from the new National Enterprise Fund for Environmental Activities (formerly the National Environmental Protection Fund).
- ◆ The results of the NTFP/NTNR collaborative management model were presented and discussed at a National Conference, held on **4 of December 2002** in Sofia. The objective of the National working meeting was (based on the experiences in the country and from the pilot projects) to recommend policy development to the GOB on NTFP/NTNR management.

Participants in the Meeting:

47 participants attended this one-day conference in December. They included the: MOEW; MOAF/National Forestry Board; Parliamentary Commission on Environment and Water; Ministry of Regional Development; 4 Regional Environmental Inspectorates, National Association of Herbs Collectors, National and Nature parks, local and national businesses — buyers and exporters, local mayors, donors – USAID, UNDP, SDC, World Bank, NGOs – environmental and regional development, Bulgarian Academy of Sciences.

Results of the Conference

- A review of the practices from the point of view of all stakeholders – Protected Areas, Ministry of Agriculture and Forests, National Association of Herbs- and Mushrooms Collectors, businesses, etc.
- Agreed assessment of the current situation.
- Agreed recommendations and action plan for improvement of the national legislation and a strategy for its adoption.

Follow-up of the Conference

The NTFP/NTNR working group prepared and presented concrete proposals for changes in the medicinal plants act to the MOEW – NNPS. The expectation is that in March-April 2003 these proposals will be finalized and submitted to the Council of Ministers as proposed amendments to the Medicinal Plants Act, particularly, its implementing regulations. The resulting regulatory will be improved and impediments to NTFP/NTNR management within national parks will be remedied. Specifically, we refer to both the amounts that can be collected under personal and commercial collection categories, and the associated payment of fees.

Remaining activities for BCEG include the completion and distribution of the NTFP/NTNR final report, production and distribution of a NTFP/NTNR CD, containing all materials of the pilot project, as well as a NTFP/NTNR conference report.

3.b Ecotourism Pilot sites**◆ Kalofer Eco-tourism Association**

Activity	Dates	Participants/Comments
Opening of the new Kalofer Information and Destination Management Center	November	USAID Mission Director and Minister of Environment and Waters jointly open new Center. Center represents a new step in the institutional development of Central Balkan-Kalofer Ecotourism Association public-private partnership.
Five new members join the Kalofer Association, including new members from neighboring settlements	Since January 2003	One each from Kazanluk and Karlovo

• **Rila Eco-tourism Association**

Activity	Dates	Participants/Comments
Rila Eco-tourism association participates in the implementation of the GTZ-REC Project in partnership with Children of the Earth Association. Project is an international effort launched by Rila National Park and Rila NGO-Children of the Earth, to develop and market environmental education in Albania, Serbia, Macedonia, and Bulgaria, as enterprise activities.	November 02	1 st international workshop conducted with 35 participants from four countries
	February 03	2 nd international workshop conducted with 36 participants from 4 countries
	January 03	3 rd national workshop conducted with 15 participants

Accomplishments of Both Associations

Activity	Dates	Participants/Comments
The two associations begin implementation of their project grants awarded by USAID through World Learning – a post 2001 PTP event.	December 02 training starts and action plans implemented	Eco- tourism Associations from both parks are recipients of hospitality training skills development, marketing, and membership promotion.
The two associations develop and present their projects awarded at the National Eco-tourism Forum. Rila Ecotourism Association is developing a mountain biking network and enterprise focused on northern Rila National Park. Kalofer Ecotourism Association is developing an outdoors skills training program (Outward Bound) for children focused on Central Balkan National Park.	November- January	2 new project concepts for private public enterprises developed in conjunction with National Parks are finalized.
Activity	Dates	Participants/Comments
Business development consultant finalized work with the two associations and submitted final reports for business development.	January 2003	Destination management business plans have been developed with both ecotourism associations over the last 6 months. These plans are now guiding association actions and investments.
Park focused ecotourism associations participation in the National Eco-tourism Working meeting	February 2003	Park focused ecotourism associations include three national parks, and 7 of the 10 nature parks.

National Eco-tourism Developments

Activity	Dates	Participants/Comments
National Parks and Eco-tourism Planning Workshop	November 14	<ol style="list-style-type: none"> 1. Three National Parks directors 2. Tourism, infrastructure, public relations experts and section heads of the National parks 3. Parks section heads – from North Rila NP and South of Central Balkan NP 4. BSBCP – Pirin management planning project team
<p>Objectives Based on the experiences and lessons learned, to help the National Parks develop their strategies and action plans for the future development of Eco-tourism in additional communities around each Park.</p> <p>Results:</p> <ol style="list-style-type: none"> 1. Strategies and action plans for the development of the eco-tourism in National Parks during the next 3 years. 2. Initial project proposals formulated for the next three years and are included in the annual plans of the directorates 3. Concrete proposal for update of the secondary legislation to allow contracts for eco-tourism services with businesses. 4. Vision agreed about the possibilities of concessions for tourism infrastructure to be presented at the National Financial Mechanisms Workshop. 		

Activity	Dates	Participants/Comments
Finalize the draft National Eco-Tourism Strategy: <ul style="list-style-type: none"> ▪ Technical review meetings ▪ Drafting Team Meetings; ▪ Incorporate international consultant contributions; ▪ Results of National Eco-tourism Forum of October 02 incorporated 	Nov-Dec 2002 January 15 Nov-Dec 2002 Nov-Dec 2002	The Project serves as a secretariat for including commentary and new text into an evolving text for the national ecotourism strategy. Concepts and text are produced by Bulgarian technical specialists, international consultant, Don. Hawkins, International Organizations, and drafting team members.

Activity	Dates	Participants/Comments
National Eco-Tourism Meeting	February 11-12	See below

Objectives

- ◆ Official launching of the Draft National Eco-tourism Strategy (NETS) to government and national stakeholders.
- ◆ Deliberation of the process for finalizing the Strategy aimed at building political ownership, and initiating of a process of consolidating regional/local eco-tourism stakeholders, that leads to a 5-Year Action Plan for eco-tourism activities and investments.
- ◆ Identifying possible mechanisms for donors coordination for the implementation of the Strategy.
- ◆ Presentation and marketing of the 12 eco-tourism initiative project award winners soliciting support for project implementation from national and international funding sources.

Participation

164 Participants, including representatives of seven ministries and one agency; the Parliamentary Commission on Environment and Waters; National Park and Nature Park Protected Areas Managers; National Tourism Agencies; National and regional associations of municipalities; Non-governmental organizations; Regional and local tourism associations and tourism councils; National and international donors and their programs; Commercial banks; Private entrepreneurs; Educational and academic institutions; Regional governors and local government mayors

Program

The meeting was opened by Mrs. Dolores Arsenova, Minister of Environment and Waters of Republic of Bulgaria and Mrs. Debra McFarland, Mission Director of the United States Agency for International Development in Bulgaria.

Introductory statements made by: Mrs. Fatme Iliaz, Deputy Minister of Environment and Waters (*Expanding the inter-ministerial cooperation to include Ministries of Regional Development and Culture*); Mrs. Meglena Plugchieva, Deputy Minister of Agriculture and Forests (*The role of ecotourism in Forestry and Nature Park policy and practice*) and Mr. Dimiter Hajnikolov, Deputy Minister of Economy (*Institutionalizing Ecotourism as a theme within National Tourism Development*).

DAY 1 - Devoted to review and discussion of the Draft National Eco-tourism Strategy for Bulgaria. The following were presented and discussed:

- Overall framework of the Strategy;
- Strategic objectives and measures for their achievement;
- Mechanisms for Strategy implementation and geographical priorities;
- Activities proposed for Strategy finalization and elaboration of a 5-year Action Plan.

DAY 2 - Donor programs on eco-tourism, and opportunities for donors coordination in future implementation of eco-tourism projects.

Presentation and discussion of the twelve innovative eco-tourism projects awarded at the First National Forum *Eco-tourism, Mountains and Protected Areas. Partners for Prosperity*, October 2002. (A summary of the Ecotourism Innovation Projects is attached as **Appendix 4**).

National Meeting Results:

Participants agreed unanimously on three main conclusions:

- ◆ **The need to finalize the NETS and to use this process to *elaborate a five-year Action Plan.***
- ◆ **Develop and enrich the NETS through a process of *local and regional review.* This process should contribute substantially to the elaboration of the National Eco-tourism Action Plan.**
- ◆ **Recommend that the NETS and its completion be *institutionalized as a National working group within the National Tourism Council.***

The meeting contributed the first steps towards the future coordination of donor support for future NETS implementation. Representatives of following institutions made presentation in the specialized session: Delegation of the European Commission in Bulgaria and the ministerial coordination units of PHARE, ISPA and SAPARD Programs; United Nations Development Program; National Trust Eco Fund, and National Enterprise Fund for Environment Activities Management.

Public Awareness

The working meeting was supported by a wave of wide public information on eco-tourism issues in Bulgaria. The meeting was covered by 34 publications in the national printed media, four publications in the electronic newspapers, over 1 hour and 40 minutes of radio and TV broadcasts.

Follow-up

- **By the end of February**, written comments to the NETS were received.
- **March 31** – Publish on the ecotourism website the full results of the National Ecotourism Meetings, participants list, and 12 ecotourism innovation project summaries, with a public record of expenditures of project feasibility grants.

Website: www.moew.government.bg/eco-tourismforum

April-30 Finalize the NETS including recommendations of participants made during the meeting.

Finalize a proposal for institutionalization of the National Working Group within National Tourism Council. Present a plan of action to finalize the draft strategy to the National Tourism Council.

The following reports were released by the Project and address this contract result:

1. *Institutional Development of Ecotourism Initiative Groups*, Nelly Georgieva, BCEG Project Consultant
2. *Destination Management Business Concept – Kalofer*, Nikolay Ivanov, BCEG Project Consultant
3. *Destination Management Business Concept – Samokov*, Nikolay Ivanov, BCEG Project Consultant
4. *A Guidebook for Monitoring Ecotourism Impacts on Protected Areas and Surrounding Communities*, Maria Vodenska, BCEG Project Consultant
5. *Bulgarian Ecotourism Development Outlook – Survey of the Domestic Market*, Plamen Vulchev, BCEG Project Consultant

Ecotourism Innovation Awards Update

Two ecotourism innovation projects submitted revised versions of their projects based on feedback received from the National Ecotourism Meeting. Both projects addressed ecotourism for the handicapped/disabled. They are the Tourism Council Etropole and Zlatni Piastsi Nature Park. Consultations with the national NGO specialized in programming for handicapped people "Center for Independent Life" provided valuable contributions and endorsements to both proposals.

The Kalofer Ecotourism Association Project was submitted to the National Enterprise Fund for Environment Activities Management for funding. The Strandja Nature Park Eco-tourism Innovation Project was submitted to the British Embassy for funding.

CRP 4 Mechanism for National Park Financial Sustainability Established

Indicators	Target	Actual 4/02
Number of policy constraints addressed (<i>resulting in changes to income generation and long-term park financing</i>)	4	4
Number of innovative financing mechanisms developed and tested	2	4
Number of support workshops organized and facilitated	8	4
Number of mechanisms established	2	0

The Project continued to promote and pursue the following examples of financial mechanisms:

- 4.1 ***Parks (Endowment) Fund*** – the Parks Fund was officially adopted into the National Trust Eco Fund (NTEF) in February of 2003, by unanimous Board decision. The Parks Fund is now an official Fund within the operational mandate of the National Trust Eco Fund. This decision provides the Fund formally, with an institutional home.

Policy and Legal Framework

Adoption of the Parks Fund within the NTEF will require two important activities to be conducted by the NTEF. These are:

1. Incorporation of the Parks Fund within the NTEF's governing bylaws and statutes.
2. Development of a set of grant guidelines and requirements that meet donor criteria and satisfy the requirements of protected areas;

Fundraising

The Government of Bulgaria, in a meeting between MOAF, MOEW and the MOE, on October 7, 2002, committed, in principle, 12.5 million Bulgarian leva to the Fund over the next five years (2003-2007). This is the basis for two major efforts now, for the NTEF:

1. Renegotiations of the match rate from GOB from 1:3 to 1:1;
2. Matching funds from international and local sources;

World Bank/GEF - The World Bank/GEF remains the most likely source for a significant injection of external funds to the Parks Fund. The GEF funds and their release are subject to a project design that will be conducted between March and September 2003. Project design will be conducted by an Irish Consulting group with whom the BCEG Project and NTEF will work closely in order to assure that GEF funding criteria are met.

Conservation International - The BCEG Project submitted a feasibility study proposal to Conservation International for a project that would expand the definition of the Mediterranean Hotspot to include parts of southern Bulgaria. The feasibility study would help to establish Bulgaria's eligibility for money for new protected areas, under the CI focal areas for new concept note for consideration by its Global Conservation Fund (GCF). The feasibility study proposal requests \$19,000 USD for a review of the criteria used to describe the Mediterranean Hotspot and some fieldwork. Implementation of the Study would be managed by the National Trust Eco Fund, and conducted through the MOAF and Bulgarian Academy of Sciences. If successful, the results of the feasibility study are expected to show that Bulgaria qualifies for GCF funds to establish new transboundary protected areas, a priority of the MOAF. Funds from the GCF for the establishment of any new protected areas would be managed by the National Trust Eco Fund, through the Parks Endowment Fund, and it would leverage GOB matching contributions.

A copy of the Feasibility Study Proposal is attached as **Appendix 5**. The request for support was submitted by the NTEF with endorsements from the Bulgarian Academy of Sciences, and the Ministry of Agriculture and Forests, in December 2002. No response has been received from CI to date.

Preliminary Public Awareness Targeted at US Government Agencies and Private Foundations

500 copies of a Parks Fund advertisement presenting the new Parks Fund and emphasizing the natural and national values of the Bulgarian National Parks were produced in both Bulgarian and English, as a fundraising and publicity tool.

50 copies of the Parks Fund advertisement, together with the Bulgarian National Parks multi media CDs were distributed by D. Nenkov, Executive Director of the NETF during his USAID-sponsored environmental training program to the USA.

Short Term Technical Assistance

Endowment Fund specialist Jared Hardner completed two scopes of work during this reporting period.

1. Investigate conditions and criteria for GEF funding for Trust Funds, and outline compliance requirements that the Parks Fund must consider as it qualifies for GEF funding.
2. Develop a plan of action and rationale for incorporating the Parks Fund within the NTEF.
3. Identify constraints and challenges to organizational development of the Parks Fund within the NTEF.
4. Investigate the use of the GDA as a source of funding for the Parks Endowment Fund.
5. Assist the NTEF and BCEG Project to develop a work plan that would guide NTEF activities for the remainder of 2003.

Mr. Hardner provided 14 days of work in meeting objectives 1-4 in November of 2002, and 10 days of work to complete objective 5, in February of 2003. His memoranda on these assignments and outputs are attached as Appendix 6.

4.2 Park Income Generation and Revenue Collection Tools – Four additional experimental mechanisms have been introduced over the course of this Project:

Concessions

The results of BCEG Project supported concessions systems have been summarized and presented in a Financial Mechanisms for Protected Areas National Workshop on December 17 and 18, 2002. 40 participants included representatives from Government, NGOs, the Bulgarian Academy of Sciences, and donor organizations. The results of this workshop are reflected in a separate workshop report. Changes to the legislative framework (the regulation government the use of concessions/commercial contracts for tourism services and facilities within National Parks is being drafted and will be presented to the MOEW and Council of Ministers in March/April, 2003.

NTEF/NTNR Collection Permits and Permit System

The NTEF/NTNR collaborative management model, collection coupons and revenue generation experience to date, were presented in a national seminar on the subject on December 4, 2002. New policy recommendations were formulated at the Seminar, and are reflected in changes to the Medicinal Plants Act in March/April of 2003. (See Section 3.a)

Results of the dramatic increases in revenues for National Parks as a result of the new model were acknowledged in the Financial Mechanisms Workshop two weeks later. The NTEF/NTNR resource assessment methodology was also used to highlight the financial values of non-timber natural resources collection to community livelihoods around the Parks. The NTEF/NTNR resource assessment results, combined with the local tourism revenue

generated by park-based tourism is the first convincing argument illustrating that proper park management pays its own way.

This summary of the costs and benefits of national parks to the national economy is a powerful argument for the continued financing of national parks operational costs and implementation of management plans. A costs-benefits analysis summary of the three national parks is attached as **Appendix 7**.

Grant Writing and Project Fund Raising

As reported earlier, the National Parks and their partners have successfully engaged in number of grant writing projects. Most significant among these grants and future income generation opportunities is the PAN Parks model. Central Balkan National Park will be the first Candidate Park in Bulgaria, and completed the pre-qualification round for acceptance into the PAN Parks network. Compliance with this voluntary licensing authority for protected areas and tourism management quality standards should result in value added to National Park public awareness, marketing, and tourism development. It also affords Bulgaria a chance to enter an elite group of Western European Parks that are promoting their operations according to the highest standards. This rating adds value to tourism products and helps promote Bulgarian tourism development.

A national seminar on the PAN Parks certification system for investments related to tourism was hosted by the MOEW on November the 15, in Sofia, Bulgaria. Rila also has good prospects of being adopted into the PAN Parks network.

During this reporting period, PAN Parks indicated that they will hold their next international conference in Central Balkans National Park as they are impressed with the Park, its management plan, and its operations. The Park will feature during international deliberations of some 13 countries during their September 2003 meeting.

Public-Private Partnerships

Both eco-tourism associations generated six new eco-tourism and income generation projects. Four of them are under implementation and two of them are seeking funding.

- Public support and public awareness for eco-tourism in the regions of Samokov and Kalofer – funded by USAID through World Learning – under implementation – 2003;
- Commercializing environmental education and ecotourism products in the surroundings of Rila National Park – Green Schools. Funded by GTZ/REC-Budapest – under implementation – 2003;
- Development of adventure trail in Rila National Park – Design phase funded by USAID through the BCEG Project; Construction phase funded by the National Enterprise Fund for Environmental Activities (former National Environmental Protection Fund) – under implementation –2003;
- Development of adventure trail in Central Balkan National Park – Design phase funded by USAID through the BCEG Project; construction second phase funded by the National Enterprise Fund for Environmental Activities – in implementation – 2003.
- *Development of Mountain Biking Enterprise and Network in the northern region of Rila National park – seeking funding*
- *Mountain safety and Behavior Skills Training Center for Children, Kalofer Ecotourism Association, Central Balkan National park – seeing funding.*

Result 3 Greater Public Awareness and Participation is Demonstrated in Protected Area Management

This result reflects an over-arching theme in the BCEG Project. Public information and awareness are key components of both national and park-focused efforts. For our purposes, we report on public awareness activities of a national scale, and activities on a park level.

CRP 6 Public Awareness and Promotion Campaigns Implemented

National Public Awareness Campaign	Target	Actual 2000-2001	Actual 2001-2002
Number of public awareness strategies developed	1		
National level		1	1
Park level		2	2
Rila Monastery Nature Park ***		1	1
Number of targeted public awareness events and materials			
✓ Targeted public awareness events	20	9*	
National level			
Park level			
Nature Park			
✓ Public awareness material sets	5	4**	
CHM realized through technical assistance, needs assessment and mechanism design package (added to project indicators)	1	1	1

* targeted public awareness events includes those events related to public hearings for management plans

** public awareness material sets includes those materials developed and used in support of public hearings for management plans.

*** indicates that a separate plan, activities, and plan are conducted in favor of Rila Monastery Nature Park management planning activities.

Our National Public Awareness campaign is characterized by two major phases:

Phase 1 – May 2000- April 2001 – generate increased public information on biodiversity conservation legislation, and the finalization of the Republic's first national park management plans. The major publication – GREEN GOLD of Bulgaria is launched in major national and regional public campaigns.

Phase 2 – May 2001 – September 2002, is designed to support Management Plan implementation after their passage by the Council of Ministers. It will have a particular emphasis on Bulgaria's newly elected parliament after June 2001, the private sector, and Bulgaria's role as a leader in European biodiversity conservation efforts

6.1 Work with the “Green Media Machine”

Journalist Tour to Senokos Village in Blagoevgrad's Region – 22 November 2002

BCEG Environmental Education and Communication Specialist organized a one-day journalist's tour to this Pirin Tourism Forum (PTF) NGO eco-tourism pilot village. The village is one of the ten around which eco-tourism routes will be developed under the PTF Project awarded at the National Forum “Eco-tourism, Mountains and Protected Areas – Partners in Prosperity”.

The program of the tour was designed to cover the local government and community preparation for eco-tourism development, the strong natural and cultural features of the region and the opportunities they give for tourism development.

All journalists who cover the environment and tourism issues in the Central Media were invited. Given below is the list of those who took part in the tour:

<i>N</i>	<i>Name</i>	<i>Media</i>
1.	Slaviana Manolova	Trud Weekly
2.	Vera Dacheva	Vsichko za Jenata Weekly
3.	Rumiana Panaiotova	Hristo Botev
4.	Dian Nikolov	Sega Daily
5.	Nikolay Doichinov, photographer	Sega Daily
6.	Marian Jordanov	Kesh Weekly
7.	Velin Javorski	Bulgarian Army Daily
8.	Svetlana Jankova	7 Days TV
9.	Nikolai Markov, camera man	7 Days TV
10.	Miroslav Ivanov	Dnevnik Daily

Participants included:

- **Simana Markovska, Executive Director, the Pirin Tourism Forum NGO**
- Georgy Georgiev, Project Coordinator for PTF
- the Pirin National Park Directorate, Georgy Grancharov, Director
- *the local authorities:* Todor Vezenkov, Senokos Village Mayor
- Ilinka Marianska, Chief Environment Expert for the Simitli Municipality

The BCEG Project provided logistical assistance and coordination of the event.

The tour provoked a series of newspaper articles and radio/TV broadcasts. A list of them follows, indicating the newspaper circulation and the Radio Station audience.

Time and Date	Radio Broadcast/Article	Duration/ Size	Circulation/ Audience
25 November	Reportage in Sega Daily about the opportunities for ecotourism development in Senokos village area	120 lines, 4 photos	20 000
30 November	Reportage in the 7 Dni TV Eco Bell specialized environment program	10 min.	Fifth largest in country
5 December	<i>Article in Dnevnik Daily about the PTF work on a 10 eco-trails in Pirin project</i>	45 lines	6 000
5 December	Article in Bulgarska Armia Daily about Georgi Georgiev, Project Coordinator at the Pirin Tourist Forum who has more than 3000 photos from the Pirin Region.	120 lines, 4 photos	11 000
5 December	Article in Kesh Weekly	60 lines, 3 photos	12 000
6 December	Article in Bulgarska Armia Daily "Ecotourism – One of the Ways to Revitalize the Mountain Settlements"	35 lines, 1 photo	11 000
6 December	Reportage from the tour in the specialized "Sustainable Development" Program of Hristo Botev, BNR	12 minutes	The country's largest
13 December	Reportage in the Newspaper for the Woman Weekly	80 lines, 3 photos	80 000
18 January 2003	Reportage in the specialized "Sustainable Development" Program of Hristo Botev, BNR	6 minutes	The country's largest
23 January 2003	Reportage about the opportunities for ecotourism development in Senokos village area in Trud Weekly	120 lines, 5 photos	300 000 (the largest circulation in the country)

Provoked Articles and Broadcasts

A. Capital Weekly published four newspaper pages of materials on ecotourism and its future development in Bulgaria entitled "**Ecotourism – a Dream or an Opportunity**" on **9 November**. The supplement was announced on the first page of the issue as "Main Theme of the Issue". It comprised the following six articles:

- ❖ an analytical article by Boryana Gencheva on the latest developments and the perspectives of the ecotourism in Bulgaria;
- ❖ opinions of the leaders of the three major tourist organizations in country;
- ❖ an article on the draft National Ecotourism Strategy;
- ❖ an interview with Peter Hetz, the BCEG Project Team Leader on the opportunities for financing ecotourism activities and projects;
- ❖ and two articles on the market surveys presented at the Forum – of the World Tourism Organization (international markets) and of the BCEG Project (domestic market).

B. In November the BCEG Project Communication Specialist provoked a series of articles and radio and TV broadcasts dedicated to ecotourism and to the organizations that were recipients of the Innovative Eco-tourism Project Awards, organized within the National Forum "Ecotourism, Mountains, and Protected Areas – Partners in Prosperity". A description of the articles provoked follows:

- *An article with a photo in Trud Weekly (the newspaper with the largest circulation) presenting the twelve awarded ecotourism innovation projects. /Trud Weekly, 31.10.02/*
- Our second largest weekly newspaper Vsichko za Zhenata dedicated a page with four color photos to one of the participants in the Ecotourism Innovation Projects Contest – "Will Carpets and Tourism Save Chiprovtsi?" /Vsichko za Zhenata, 7.11.02/
- Zemya newspaper published an article about the project "Protected Areas – Rhodopes' Hidden Pearls" of the Rhodopes Eco-Organization, which was one organization receiving a project award at the Forum in October. /Zemya, 20.11.02/
- In its night show on 01.11.02 Horizont Program of the Bulgarian National Radio broadcast a ten-minute interview with Antonia Chilikova, Chairman of the Rhodopes Eco-Organization on their awarded project.
- An article about the Rila Ecotourism Association, awarded project named *In Peace with Nature, to Improve Our Contacts with It*, was published in Dnevnik Daily, 17.01.03
- An article about the Etropole Municipality Development Association and its eco-tourism project with the local authorities, businesses and non-governmental organizations, funded by USAID, was published in Dnevnik Daily, 19.12.02
- An article published in Trud Weekly presented the Etropole couple that welcomes visitors to Moon Valley – a project award recipient from the National Eco-tourism Forum Contest (*Sedmichen Trud*, Jan 1st)

C. "An American Family Helps Us Protect Our Natural Scenery", a story about Jay Lee and his wife Nadereh, both employees of USAID posted in Bulgaria for the past 4 years. Mr. Lee, a natural resources expert, has been overseeing the implementation of the Biodiversity Conservation and Economic Growth Project funded by his Agency (*Sedmichen Trud Weekly*, Jan. 9th)

D. **Trud Weekly published on 13 January a feature article with 4 photos about Raicho Gunchev**, BCEG Project consultant. Gunchev conducted a bear monitoring methodology training for the national parks staff.

E. **TV quality broadcast version of the Bulgarian National Parks CD**

The master copy of the Bulgarian National Parks TV film was formally handed out by the USAID mission director Debra McFarland to the Minister of Environment and Waters Dolores Arsenova at the official opening of the Kalofer Tourist Information Center on 2 November 2003. This was a follow-up to national TV premiere on September 24, 2002.

The information centers in and around the Rila and Central Balkan National Parks were provided with 16 copies of the tape to use in their work with visitors, schools, public events.

The Chief of Public Relations of the Department of the Ministry of Foreign Affairs, Mrs. A. Shkodrova, was provided with 9 tapes of the film at her request. The tapes will be sent to Bulgaria missions abroad and foreign TVs.

A tape was sent to the National Geographic TV at their request, and delivered through the Ministry of Foreign Affairs.

The Rila and Central Balkan National Park Directorates organized special launching events of the film for regional TVs. Tapes were handed out to 16 regional and cable TVs representatives (11 around Central Balkan NP and 5 around Rila NP) to be aired. In addition, these tapes will be added to TV libraries, and used as illustrative material in program production. A list of the film broadcasts during the reported period follows:

Date	TV	NP / Region Covered
29 December 2003	Gabrovo Cable TV	Central Balkan NP, Gabrovo region
2 January 2003	Sprint Cable TV, Troian	Central Balkan NP, Trojan municipality
4 January 2003	Rila Cable TV	Rila NP, Dupnitsa and S.Bania municipalities
11 January 2003	Rila Cable TV	Rila NP, Dupnitsa and S.Bania municipalities
14 January 2003	Pirin Channel of the Bulgarian National TV	Rila NP, Blagoevgrad region
27 January 2003	Telecabel TV	Rila NP, Sofia, Pazardjik, Belovo
2 February 2003	Telecable TV	Rila NP, Sofia, Pazardjik, Belovo
8 February 2003	Telecable TV	Rila NP, Sofia, Pazardjik, Belovo
February 2003	Nova TV	National Coverage, third largest in country audience
10 March 2003	Pirin Cable TV	Rila NP, Blagoevgrad, Dupnitsa, Kiustendil, Pernik

Media Coverage of the National Ecotourism Meeting on 11-12 February

The BCEG Project Communication Specialist worked in coordination with the three Press Offices of partner Ministries (Agriculture and Forests, Environment and Waters, Economy) to ensure Central Mass Media coverage of the National Ecotourism Meeting. In addition, the BCEG Project used well-developed relations with the "Green Media Machine" and with the journalists who covered the National Ecotourism Forum in October 2002, to publicize events.

The Campaign comprised the following steps and activities:

a. Press Conference Prior to the Meeting

The National Ecotourism Strategy Drafting Team gave a Press Conference at the Bulgarian Telegraph Agency Press Club, on 7 February. The three partnering ministries' Press Offices formally announced the press conference.

Participants – expert members of the Drafting Team: Dessislava Michalkova - expert from the Ministry of Economy, Raina Hardalova -expert from the Ministry of Environment and Waters, Liubomir Popyordanov - representative of the Bulgarian Association for Alternative Tourism, Simana Markovska - representative of the regional tourism association Pirin Tourism Forum, Andrey Goranov – representative of the Foundation for Local Government Reform; BCEG PMU.

The goal was to present the purpose and the content of the National Ecotourism Meeting on 11-12 February, and to describe the process used to develop the National Ecotourism Strategy. 24 journalists from Central Media attended. Invitation and the Press Release were sent to all 200 media subscribers of the Agency in-country and abroad.

b. Regular E-mailing of Information

A press announcement, press release, invitations, the Eco-tourism Meeting Program, and the synopsis of the twelve innovative eco-tourism projects were sent electronically to 70 journalists from Central Media and the Press Offices of three partnering ministries prior to the event.

c. Provoked Newspaper Articles and Broadcasts

Interviews with members of the National Eco-tourism Strategy Drafting Team were provoked and organized by the BCEG Project Communication Specialist. Articles, TV and radio broadcasts were organized for the period between 6-14 February.

d. Publishing Information on Web Sites

Information about the Meeting was published on the most popular Bulgarian news web sites: novinite.com (in English) and the Bulgarian Telegraph Agency, between February 7-12.

e. Provide Journalists with Materials and Information during and after the Meeting

The BCEG Project Communication Specialist operated a media stall between 11 and 12 February, at Park Hotel Moskva. The stall was an information center and used to provide journalists with information, materials and support in organizing meetings, interviews and production of articles and broadcasts.

Mass media coverage resulted in more than 1 hour and 40 minutes of aired TV and radio broadcasts and over 34 published newspaper and magazine articles. All of the registered broadcasts and articles are positive in tone and content.

TV APPEARANCES AND RADIO BROADCASTS

Covering the National Ecotourism Meeting
11-12 February, 2003

Time and Date	TV Appearance / Radio Broadcast	Duration
7 February 8:03 a.m.	Announcement for the press conference in the prime morning news of Horizont Program of the Bulgarian National Radio	30 seconds
7 February 11:20 a.m.	Interview with Simana Markovska, member of the National Ecotourism Strategy Drafting Team on Horizont Program of the BNR	6 minutes
7 February 7:40 a.m.	Live participation of Javor Stojanov, member of the National Ecotourism Strategy Drafting Team in the Morning Show of Evrocom TV	10 minutes
7 February 3:35 p.m.	Report from the press conference in the afternoon show of Darik Radio	4 minutes
7 February 4 p.m.	Report from the press conference in the specialized environment program of Radio Bulgaria, BNR	7 minutes
7 February 3:15 p.m.	Report from the press conference in the afternoon show of Horizont Program of the BNR	6 minutes
7 February 7:20 p.m.	Report from the press conference in the news of Evrocom TV	50 seconds
7 February 7:20 p.m.	Report from the press conference in the prime news of Seven Days TV	40 seconds
7 February 4:05 p. m.	Information in the news of Hristo Botev Program of the BNR	50 seconds
7 February 9:15 a. m.	Interview with the deputy Minister of Economy D. Hadjinikolov in the "Before Lunch" show of Horizont Program of the BNR	7 minutes
10 February 7:20 a.m.	Live participation of Kamelia Georgieva and Liubomir Popjordanov, members of the NEWG, in the Morning Show of the National TV	11 minutes
11 February 8:30 a.m.	Live participation of the deputy Minister of Economy D. Hadjinikolov and Liubomir Popjordanov, member of the National Ecotourism Strategy Drafting Team, in the Morning Show of bTV	10 minutes
11 February 6:20 p.m.	Interview with Kamelia Georgieva in the "Something more" evening program of Horizont, BNR	3 minutes
12 February 4:35 p.m.	Report from the meeting in the afternoon show of Horizont, Bulgarian National Radio	6 minutes
13 February 3:00 p.m.	Report from the press conference in the "Sustainable Development" Program of the Hristo Botev Program of the BNR	12 minutes

ARTICLES

Covering the National Ecotourism Meeting
11-12 February, 2003

Publication	Date	Title
Bulgarian Army Daily	10.02.03, page 16	Ecotourism – in Bulgaria of course
	12.02.03	Discussions over the National Ecotourism Strategy
Cash Weekly	14.02.03, page 18	National Strategy will develop the Ecotourism the following 10 years
Chernomorski Far Daily	11.02.03, page 23	National Ecotourism meeting on 11-12 February
Dnevnik Daily	10.02.03, page 11	Strategy will develop the ecotourism in Bulgaria
	12.02.03, pages 11-12, in English	Local eco tourism projects to receive international funding
	13.02.03, page 11	The Ecotourism will develop in 12 regions in the country
<i>Duma Daily</i>	08.02.03, page 5	12 regions for Ecotourism in Bulgaria
Factor Weekly	15-21.02.03, pages 16-17	Innovation ecotourism projects
Monitor Daily	08.02.03, page 19	300 000 Euro income from rural tourism for 2002
Novinar Daily	08.02.03, page 4	The EC gives money only for nature friendly tourism
<i>Pari Daily</i>	10.02.03, page 32	Minister Arssenova and Debra McFarland are opening the National Ecotourism meeting
	11.02.03, page 2	First draft of the National Ecotourism Strategy
	12.02.03, page 2	Special Fund to Finance Environment Tourism
	12.02.03, page 20	
	17.02.03, page 27	The Ecotourism attracts rich clients
Pari Plus Weekly	17.02.03, page 4	The First Ecotourism strategy in Europe
Sega Daily	04.02.03, page 7	First draft of the Ecotourism strategy
	08.02.03, page 9	300 000 Euro income from ecotourism
	12.02.03, page 7	The Ministry of Finances is giving 12,5 million leva for park management
<i>Standard Daily</i>	08.02.03, page 8	4000 foreign tourists had their holidays in our villages during 2002
	10.02.03, page 19	Bulgaria is divided in 12 eco zones
	12.02.03, page 10	15 million leva for the Parks
	14.02.03, page 9	To 300 000 Euro are given for rural tourism
24 hours Daily	08.02.03, page 8	300 000 Euro spent for alternative tourism
Vizh Daily	08.02.03, page 4	300 000 Euro income from rural tourism

Zemia Daily	11.02.03, page 5	Searching money for Ecotourism
	12.02.03, page 5	The EU gives 10 million Euro for Ecotourism
BTA Bulletin to all 200 media subscribers of the agency in Bulgaria and abroad	07.02.03	National Ecotourism meeting, 11-12 February 2003, Sofia
Report from the press conference in the "Daily News" Publication of BTA which is published in English and goes to its all 200 subscribers in the country and abroad	11.02.03	National Ecotourism Strategy is under development
www.novinite.com news service	11-12.02.03, in English	Bulgaria reviews National Ecotourism Strategy; Remark on National Ecotourism Strategy

6.2 Press Monitoring Reports

Three regular monthly reports and one special media report on the coverage of the National Ecotourism Meeting were produced in this period and submitted to the Donor and the partnering organizations

6.3 National Parks Web Site

7 companies were invited to take part in a tender for the National Parks Web Site production. 3 of them were short-listed and interviewed. The 4 person interview panel included representative of the NNPS/MOEW.

Solba Ltd. was selected and contracted for the production of three, linked, web sites. Provision for Pirin National Park to be included in the web site and its links were made; however, the site development of the Pirin National Park web site will be assisted by the Swiss.

7 different site designs were submitted for review and approval. Final site designs (including site structure) were selected and approved by the National Parks at the end of December 2002.

Texts for each of the sites were drafted by the National Parks, edited by the BCEG Project, and then sent for Bulgarian proof reading, English translation and proof reading.

The first version of the sites is developed and the following domains – registered:

<http://www.bulgariannationalparks.org>

<http://www.rilernationalpark.org>

<http://www.centralbalkannationalpark.org>

17 meetings were conducted in order to support development of these web sites.

6.4 Clearing House Mechanism

The BCEG Project supported the conduct of a need assessment that would help to shape the steps necessary for developing a Clearing House Mechanism (CHM) for biodiversity within the MOEW. This is a requirement of the Biodiversity Convention and the Aarhus Convention on public access to environmental information.

The Needs Assessment was completed in May of 2001, and served to guide the discussions on the design and the agenda of a National Workshop. During the January-May period, 2001, the BCEG Project coordinated its efforts with UNDP and the Regional Environment Center (REC) in Budapest for organizing a workshop on a National Biodiversity Clearing House Mechanism. The meeting was hosted by REC.

The main recommendation of the workshop participants (representatives of government institutions, donor organizations, scientific and educational institutions) was to form a National Working Group. MOEW formed such group in April 2002.

UNDP continues to support the CHM development through its Needs Assessment and CHM Development Project. Velelava Abdjieva was appointed as Project Coordinator in January 2002. A CHM Unit attached to the NNPS in the MOEW was created in August 2002. It is responsible for the day-to-day development of the Bulgarian CHM. Kiril Georgiev has been hired as a consultant to work on the creation of the information units and the web site.

The first meeting of the National CHM Working Group was held in October 2002 and the UNDP Project Coordinator prepared a set of documents that were approved by the meeting. The set includes: the organizational scheme of the Bulgarian CHM; rules of the CHM National Coordination Group; Strategy for the Bulgarian CHM development; Action Plan; a description of the suggested information units (nodes), and a Concept for the web site.

Since then the Project has been working with partner institutions to describe the content and operating principles of each of the information units. Units include: NNPS, MOAF, National Parks, Nature Parks through the new Parks Foundation, BULBIONET, Sofia University, and select conservation NGOs). The CHM is also developing a web site that will serve as the clearing house and a portal to network nodes (information units). Both tasks will be completed by July 2003.

The main goal of the Bulgarian CHM biodiversity web site is to serve as an information exchange mechanism and to provide the participants with online discussion opportunities – a Forum – both nationally, and internationally.

The UNDP Project provides technical support for the development of the NNPS web site and will develop the capacity for NNPS to host the server and portal for the CHM.

The Bulgarian National Parks web site developed under the BCEG project will serve as an important source of information, is a member of the CHM network, and will be linked to the CHM portal site.

4.0 Project Management and Administration

4.1 Project Coordination and Supervision

A Project coordination and work review meeting was conducted with the Project's Coordination Group, in light of a no-cost extension awarded to the Project in October. The meeting (in early November) was used to agree elements of a work plan for the extended period of performance of the BCEG Project until the end of March 2003.

Ms. Alicia Grimes, Project CTO, returned to her duties in mid December 2002 after a four months leave of absence.

Mr. Gold and an AAAS/USAID colleague, Jeffery Orrey, visited the Project in Bulgaria on December 5, 2002, as part of their duties with the USAID supported REC programming in the region.

Mr. Jay Lee departed for the United States in December, completing his assignment as USAID Bulgaria Environment Officer. His duties as regards the BCEG Project have been assumed by the Mission's Deputy Program Officer, Ms. Assia Alexieva.

Mr. Lee, and Ms Alexieva conducted a debriefing meeting with Deputy Minister Iliaz on November 26th informing her of changes to BCEG Project supervision with Mr. Lee's departure. The meeting was also used to discuss the request for assistance from the MOEW to USAID-Bulgaria for three follow-on components of the BCEG Project. These are:

- (1) Public hearings for the Rila Monastery Nature Park Management Plan,
- (2) Support to institutionalize the Park's Fund, and
- (3) Finalization of the National Ecotourism Strategy.

In light of Mission consideration of the request for assistance from the MOEW, the Project was requested to submit another no-cost extension application in February 2003. The no-cost extension is expected to cover the Project through June 30, 2003.

Mr. Ed Harvey continued as Project Manager in ARD's Home Office.

4.2 Project Staffing

No changes to Project national staff are noted. The accountant and IT specialist, Maria Yoroukova, departed on maternity leave on January 21st. She gave birth to a son, on January 29th. She will be absent from the office until the end of March.

The Senior Team Leader returned to the United States on home leave on December 23, 2002 and returned to Bulgaria on January 14, after conducting home office consultations in the ARD Burlington Offices.

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4.3 Office

Office rent agreement was extended until the end of March 2003.

4.4 International Technical Assistance

Mr. Jared Hardner conducted two assignments during this reporting period:

14 days LOE between November and December 2002
10 days LOE between January 15 and February 9, 2003.

4.5 National Technical Assistance

One new national STTA contract was issued during this reporting period:

Dr. Veska Russakova – 5 days, RMNP Habitats Mapping

In light of the no-cost extension, the following intermittent consultants received an extension and additional days in their contracts:

- Ecotourism – N. Georgieva,
- NTFP/NTNR – C. Gusev
- Rila Monastery Nature Park Management Plan – V. Velichkov, S. Kostadinova, D. Peev, and P. Yankov.

The following consultant contracts were concluded:

Mr. Plamen Vulchev, Ecotourism Marketing and Market Surveys

4.6 Purchase Orders

The following local sub-contracts were issued during this reporting period:

BCEG 12-02#2	Solba	Bulgarian NP web site design and production	December 15, 2002 - January 31, 2003
BCEG 01-03#1	ProGIS	Development of data base for RNP and CBNP for management of the medicinal plants allowed for commercial collection	February 1, 2003 - March 5, 2003
BCEG 01-03-#2	EKSO Ltd	Ecotourism conference materials and support	January 15, 2003 - February 14, 2003
BCEG 02-03#1	Prof. Todor Krastev Co.	Cultural Aspects for the National Strategy for Ecotourism	February 15, 2003-March 17, 2003
BCEG 02-03#2	GEOHIDE	Map production sets for RMNP Management Plan	February 15-April 7, 2003

4.7 International/National Training and Workshop Events

No international training was conducted during this reporting period.

No international meeting or workshop events were conducted or attended during this reporting period.

The following workshops/major events were conducted or attended by the BCEG Project during this reporting period:

Workshop/Event Title	Date	Comments
Kalofer Visitor Information and Destination Management Center, National Park Central Balkan	November 2 nd and 3 rd	Attended by Minister MOEW and Mission Director, USAID
Rila Monastery Nature Park – final management planning workshop	November 4-6	CPT and full interdisciplinary team, in Bansko
NTEFP/NTNR Working Group	November 14	
Pan Parks Seminar	November 15	MOEW and National Park Directorates
Parks and Ecotourism – Strategic and Annual Operations Planning workshop	November 20 and 21 st	National Parks Staff, NNPS and BCEG Project, Bankya Palace
USAID/NTEF Briefing on the Eco Fund and the new Parks Fund	November 26	BCEG/NTEF presentation to USAID Bulgaria
UNDP Rhodopes GEF Project – Integrating biodiversity conservation in landscapes and livelihoods in the Rhodopes	December 3	UNDP sponsored presentation of information collection and project design for new biodiversity conservation project in south-central Bulgaria
BCEG Project National Workshop on Collaborative Management of Non-Timber Natural Resources	December 4,	47 participants (see CRP2)
Natura 2000 launching workshop	December 10	Non-BCEG Event BAS, donors, and projects were presented with an overview of the new Danish NATURA 2000 project and development of the national ecological network.
NETS drafting team workshop	December 10	12 Members of the National Ecotourism Strategy drafting team review draft strategy and finalize descriptive section
National Protected Areas Financial Mechanisms Workshop	December 17 and 18	37 participants (see CRP 2)
NETS drafting team Meeting	January 15	12 participants – technical area specialists hosted at the Ministry of Economy
National Ecological Monitoring Workshop	January 16	33 participants from BAS, NGOs, nature and national parks, MOAF and MOEW

Workshop/Event Title	Date	Comments
National Eco-tourism Meeting	February 11 and 12	164 participants comprising government, NGO, private sector and academic institutions.
National Trust Eco Fund Board Meeting	February 19	Decision is taken by Board of Trustees to incorporate the Parks Fund into the NTEF
National Ecological Monitoring Working Group	February 20	Working Group finalizes working memorandum and matrix that will serve to guide the national parks ecological monitoring program and its institutional relations with NNPS and EEA.

4.8 International Travel

Senior Team Leader – 1 round trip ticket to the United States, Dec. 23, 2002-Jan. 12, 2003

STTA International Consultant Jared Hardner, 2 round trip tickets to San Francisco, USA.

4.9 Networking and Partnerships

World Learning – Ecotourism-Study Tour Grant Awards – the Ecotourism Associations of Rila and Central Balkan National Parks were given a joint grant by USAID/World Learning. The grant is aimed at improving the capacity of ecotourism associations for hospitality services, developing and maintaining operating standards, publicity and increasing their membership.

GTZ – Eco-tourism Forum and its results. GTZ is disengaging from regional support to ecotourism associations, but is expected to recommit to the national ecotourism strategy and its implementation in the 2004-2006 period. They have been assisting regional ecotourism development and marketing efforts in Veliko Turnovo, Smolyan, Koprivshtitsa and Kazanluk, but in the absence of a national framework.

SDC-BSBCP – for purposes of further promoting the development and institutionalization of the Parks Fund within the NTEF. The Swiss are the only donor who sit on the NTEF Advisory Board. They are also prepared to make a financial contribution to capitalization of the Parks Fund if the Government renegotiates its match.

World Bank Forestry Project – In order to secure \$2m of World Bank/GEF grant funds and to assure that we work to best effect with the project preparation team for the World Bank project, the project maintains regular contacts with the World Bank representative in Sofia and Washington, as well as the Forestry Projects PMU, in Sofia.

UD/FLAG – the project maintains regular contact with FLAG in regard to two ecotourism objectives:

- (1) eco-tourism commercial financing institutions and networking, and
- (2) eco-tourism (bed and breakfast) cataloguing and training.

UNDP – We continue to work closely with the UNDP program in Bulgaria on three common areas of programming:

- (1) the National Biodiversity Clearing House Mechanism;
- (2) the Rhodopes GEF Project;
- (3) the National Ecotourism Strategy.

We have also been working with the UNDP program to review aspects of financial mechanisms in support of national biodiversity conservation programming, and the new sustainable agriculture and development program to be launched with the MOAF in western Bulgaria. UNDP's Beautiful Bulgaria and "Chitalishte" programs, as well as their Business Incubators, are important complements to the national eco-tourism strategy's implementation.

LGI/FLGR – the project maintains regular contact and dialog with the LGI program, particularly as they focus assistance on the development of Regional Tourism Association for the Smolyan region. Both the BCEG Project and the LGI are demonstrating the efficacy of organizing tourism development and networking around regional and local government as key to the longer term success of decentralized, profitable development of Bulgaria's rural, sustainable tourism areas.

The **Foundation for Local Government Reform** has become an active collaborator on the preparation of the draft National Eco-tourism Strategy. We have engaged with the FLGR to examine the strengths and benefits of a working partnership that would help to finalize the NETS through a process of regional public hearings and strategic planning. This approach offers FLGR:

- (1) another dimension to their local government portfolio,
- (2) helps to develop their capacity in eco-tourism planning and development as an important function of local government development, and
- (3) provides an institutional home for eco-tourism in a stronger national context than at present.

USAID-Bulgaria Mission Partnership Training Program – The Project submitted two training concept papers for the USAID-Bulgaria Mission Training Program:

- (1) for a study tour to the United States to further eco-tourism planning and development as a local government function; and
- (2) to help the NTEF Board of Directors and Executives develop the organizational culture and skills necessary for endowment management and fundraising.

The second proposal has been accepted for funding by USAID. The UK will be the destination for up to 8 participants and a translator. A copy of the PTP study tour concept is attached as **Appendix 8**.

Regional Environment Center - Budapest. The Project continues to exchange information with the Biodiversity Program representative at REC to coordinate on aspects of transboundary protected areas development with Macedonia, Greece, and Former Republic of Yugoslavia. The REC was an active participant at the recent National Eco-tourism Meeting because of the applicability of the BCEG/Parks eco-tourism model to a trans-boundary-protected area between Bulgaria and Serbia.

Danish Environmental Protection Agency – the Project maintains links with the Agency’s representative in Sofia for purposes of coordination on the implementation of the NATURA 2000 project designed to describe the national ecological network (NEN). The NEN is an important cornerstone of the new Biodiversity Act.

APPENDICES

Appendix 1

**Capital Investment Projects
Bulgarian National Parks**

Status Report

**List of Rila National Park Projects
Supported by the BCEG Project – USAID Funds
2001 - 2002**

Pr. No	Park Plan Ref. No	Project Title	Year	Costs BGL	Project Summary
1.	3.1	Tourist Picnic Areas	2001, 2002	13450	Purpose: Provide visitors with 25 locations equipped for rest and picnics in the park – fireplaces, benches, tables. How many: 50 tables, 100 benches, 25 fireplaces Where located: throughout major entrances to Rila NP
2.	3.2	Park Entrance Points	2001, 2002	49200	Purpose: Provide Rila NP with official entry points and official identity for all tourists. How many: Reproduction and installation of 8 Park main entrance constructions; 30 secondary park entrance constructions; 35 tertiary park entrance constructions; 8 sets of letters and prints for the main entrances arcs Where located: Rila NP Main, secondary, and tertiary entrances
6.	4.11/27; 5.4.1/2	Interpretation and Education Facilities (Samokov)	2001, 2002	16000	Purpose: Development of interpretative infrastructure and ecotourism development opportunities in the area of Beli Iskar, Govedartsi, Borovets. What produced: Interpretive Botanical trail: 103 Vascular Plants- An Interpreter's Guidebook; Tourist Leaflets – Friends of the Plants; Trail signs; (10 boards interpretive boards); Outdoor classroom; foot Bridge; Shelters – 2; entrance point Trail head information board. How many: Guidebooks – 20; Leaflets – 2 000 copies (1000 in Eng and BG). 10 interpretive boards, one foot bridge, one outdoor classroom area, and two shelters.
7.	4.13	'Rila NP – Known and Unknown' Environmental Education Set	2001, 2002	4157	Purpose – Support to conservation education in local schools around the Park. What produced: A set of curriculum support materials for conservation education How many: 1 teacher support guide; 2 000 copies Where located: 150 schools located in the municipalities around the Rila NP
8.	4.14.16	Seven Lakes Trail Guide	2001	200	Purpose: Promotion of local expertise and use of BG guidebooks to the Park; as well as promotion of the Rila NP image. What produced: Promotion and premiere of the guidebook, "From ancient Germane to the clan roots of the Saparevobanians". by Vassil Koritarov, hosted by the Park Directorate in the Panichishte Visitor Center.

Pr. No	Park Plan Ref. No	Project Title	Year	Costs BGL	Project Summary
10.	4.22	Visitor Information and Safety Materials	2001.	7000	Purpose: Provide contemporary public information on important park management themes. What produced: Park management leaflets for: Fire prevention; waste treatment and disposal; safety; herb collection; nature protection; fishing; zoning and regimes How many: 11 theme leaflets; 1 000 copies of each distributed through Park Chalets, and main entrance public and commercial facilities
14.	2.1	Medicinal Plants Management Plan	2002 incomplete	10000	Purpose: Establishment of non-timber resource assessment system and database (GIS format), including the 2002 bilberries assessment. A resource conservation and management tool, allowing sustainable collection of economically valuable species. Establishment of park non-timber natural resources and medicinal plants management model. Determination of commercial NTFP/NTNR resource localities. What produced: GIS database for the park natural resources and medicinal plants. GIS information layers, production of 1: 25 000 and 1:50 000 maps; Draft TOR for the development of medicinal plants section in the MP; Park Staff (23 people) trained in phaeological monitoring and assessment of medicinal plants Where located: Rila NPD, with data base and GIS also at NNPS.
15.	4.15	Park Brochure	2002	1000	Purpose: Popularization of the Rila NP protected territory, natural values and tourism opportunities for English-speaking visitors. Wider advertising of visitor opportunities in the Park. What produced: Rila NP Leaflet and map (in English) How many: 1 000 copies.
16.	3.2/4	Tourist Infrastructure/ Signage	2002	66073	Purpose: Provide visitors an orientation and information of park themes, tourism destinations and routes. This project complements the development and installation of infrastructure at the major and minor entrances to the Park. What produced & How many: 100 all-weather, information boards for main, secondary and tertiary entrance constructions, rest sites, viewing points, including rules about the behavior in the park and park zones map; 30 internal information boards, with 30 wooden support constructions for display in chalets, shelters; 1200 all-weather directional and restrictive signs; 9 façade boards for the Park section offices, and 4 façade boards for Control and Information points; 23 all-weather information boards for the four reserves in the park. 5 all-weather information boards for the natural landmarks in the park and 2 all-weather information boards for "Urdini Ezera" natural landmark. – Govedartsi PS.

Pr. No	Park Plan Ref. No	Project Title	Year	Costs BGL	Project Summary
18.	6.5/6/7	Waste Management Projects	2002	11931	<p>Purpose: Develop a model for environmental management of chalets in the national park. For the improvement of the nature conservation and decreasing the infrastructure and anthropogenic presence impact in park territory a feasibility study and project proposal was conducted - Existing data crosschecking; chalet matrix development; chalet matrix data collection; Proposition for technical solutions; Recommended guidelines for waste management in high-mountain infrastructure as well as water and sewage systems..</p> <p>What produced: Situation analysis and ranking of environmental management problems with chalets in both national parks. Feasibility study for new and improvement environmental management system for priority Chalets in the CB and Rila NPs, waste management solutions identified, national parks policy guidelines developed, and tender document for priority chalets environmental management project developed.</p> <p>Where located: Rila and CB National Parks</p>
19.	CRP 2	REC – Regional Ecotourism Fund Raising	2002	708	<p>Purpose: Create examples of public private proposals that secure grants that benefit the Parks and local environmental enterprises.</p> <p>What produced: Project proposal for Ecotourism –green schools – developed and funding secured for international environmental education enterprise in the Balkans worth \$37,000.</p> <p>Where located: Rila NPD and Children of the Earth NGO - Blagoevgrad</p>
20.	2.1	Blueberries Resource Assessment – Yakoruda, Belitsa	2001	3241.06	<p>Purpose: Develop the methods and procedures for launching a collaborative resource assessment activity as part of the NTFP/NTNR collaborative management models for National Parks.</p> <p>What produced: Bilberries resource assessment model developed for 2001; 1:25 000 and 1:50 000 maps of the Yakoruda and Belitsa PS with bilberry localities; Reports on overall status of the resource; wildlife dependence on the resource; anthropogenic influence; and heavy metal contents; Training of park staff (7 people) in implementation of the medicinal plants resource assessment.</p> <p>Where located: Rila NPD, NTFP/NTNR Pilot Areas</p>

Pr. No	Park Plan Ref. No	Project Title	Year	Costs BGL	Project Summary
21.	2.4	GPS Training	2001	2211	<p>Purpose: Develop the capacity of Park staff to use and operate global position system receivers and to introduce this technology into their park management systems and GIS digital model.</p> <p>What produced: 15 Park staff trained in operating GPS units, data collection; GIS experts training in use of specialized software geodetic conversions; Development of special software converter – WGS 84 into 1970 format.; GPS - AutoCad software conversion.</p> <p>Where located: Rila NPD</p>
22.	2.4	Drawing Zone Borders – Management Plan	2001	459.65	<p>Purpose: Meet the requirements of the Council of Ministers to supply digital models of the Park Management Zones</p> <p>What produced: Management Zones of the park digitized; Park zones reconciled with cadaster and Park GIS. Digital models – GIS – provided to NNPS and NPD</p> <p>Where located: MOEW and Rila NPD</p>
23.	MP 5.5.7/5.4.1	Eco-Trails	2002	6000	<p>Purpose: Provide visitors to the national parks with alternative visitor activities that can be used to interpret the Park experience, generate revenue, and be managed by local ecotourism associations.</p> <p>What produced: Two design projects and TORs for Beli Isskar eco-trail (Rila NP) and Biala Reka Eco-trail (CBNP); Technical specifications of the materials to be used.</p> <p>Where Located: Rila NPD; CBNPD</p>
TOTAL BGL: 191630.71					

**List of Central Balkan National Park Projects
Supported by the BCEG Project – USAID Funds
2001 - 2002**

Pr. No	Park Plan Ref. No	Project title	Year	Cost BGL	Project Summary
3.	1.4	Bilberries NTNR Resource assessment	2001	3931.71	<p>Purpose: Develop the methods and procedures for launching a collaborative resource assessment activity as part of the NTFP/NTNR collaborative management models for National Parks.</p> <p>What produced: Bilberries resource assessment model developed for 2001 collection season; 1:25 000 and 1:50 000 maps of the Klissura Pilot Area; Reports on overall status of the resource; wildlife dependence on the resource; anthropogenic influence; and heavy metal contents; Training of park staff (7 people) in implementation of the commercially valuable medicinal plants</p> <p>Where located: CBNPD – NTFP/NTNR Pilot area Klissura</p>
4.	4.2/4	Tourism Infrastructure in Kalofer Pilot Area	2001- 2002	16689	<p>Purpose: Improved visitor management facilities for the Kalofer ecotourism pilot area. viewpoints + one tourist rest site; construction of 3 park entrances, installation of 8 Djendema reserve boards; repair of bridges and water taps along tourist trails – including benches, tables, fireplaces (where appropriate). Development of White river bivouac children playground – park furniture elements.</p> <p>What produced: benches 36; tables 17; toilettes- 2; fireplaces 7; seats – 28; information and interpretation boards for Djendema reserve – 8; children playground elements – 2. Three viewpoints, and one rest area.</p> <p>Where located: CBNP – Kalofer Park Section</p>
8.	5.2	Archeological Research	2001	2523	<p>Purpose: Add important cultural and historical resource information known from the national park, and complete the inventory and preservation requirements to secure sites. Provide recommendations for future conservation and interpretation of the cultural, historic and archeological objects and sites in the following routes: Tuzha chalet – Russaliiski pass, northern sloes of Rosovatetz and Zelenikovets peaks, Vassil Levski village, Troyan pass area – Chuchul peak.</p> <p>What produced: Report, maps, photographs and interpretive materials for previously unknown historical sites and objects for inclusion in the tourist trails.</p> <p>Where located: CBNP northern section.</p>

Pr. No	Park Plan Ref. No	Project title	Year	Cost BGL	Project Summary
11.	5.7	Portable Exposition - CBNP Fauna	2001, 2002	2780	Purpose: Design and develop a sturdy, informative mobile exhibition on the fauna of Central Balkan National Park. What produced: Portable color exposition "Fauna of the CBNP" produced in 8 2 meter x 4 meter mobile panels. Where located: CBNPD and surrounding municipalities/public halls/schools.
12.	5.8.1/2	Post Card Set – public private enterprise and income generation activity	2001, 2002	4000	Purpose: Develop a set of Park promotional materials that provide three benefits: (1) produce a photo library for future publicity, conservation education, and illustration purposes using a photo contest; (2) result in an exclusive set of postcards promoting the Park; (3) develop a public-private enterprise agreement where sales of the postcards result in a recovery of costs and profits for the enterprise. What produced: 1000 Post card Sets of 12 images each, with exclusive CBNP photos, and 112 photos collected for the National Park photo library Where located: CBNP; Information centers
16.	MP 5.1.1	Marking of the Reserves Boundaries	2001.	8700	Purpose: Improve park and reserves management through sign posting of strict nature reserves, in accordance with the park MP. What produced: 7 000 reserve boundary marking signs; and paint marking of the Boatin, Steneto, Severen Djendem, Sokolna, Tsarichina, Koza Stena, Peeshti skali, Djendema reserves. How many: total marked kilometers: 262.5 km Where located: CBNP
17.	MP 5.5.3	Internet Connection – Radio Modem and Installation, Gabrovo HQ	2001	1960	Purpose: Provide modern, dependable internet connection for the National Park in a community where analog telephone services restricts internet access. What produced: Radio-modem Internet connection and installation. Cost effective, due to the non-dependence of the telephone or other lines. Where located: CBNP, HQ
18.	MP 5.5.4	Management Plan Training for the CBNP Rangers	2001	3451.56	Purpose: Orientation of Park Staff Training about Park Management Plan, its objectives; philosophy; structure; importance What produced: 42 rangers and 6 park sections heads oriented to MP objectives, philosophy, structure, activities, and projects. Where located: CBNP

Pr. No	Park Plan Ref. No	Project title	Year	Cost BGL	Project Summary
19.	2.6	Medicinal Plants	2002 incomplete	10000	<p>Purpose: Establishment of non-timber resource assessment system and database (GIS format), including the 2002 bilberries assessment. A resource conservation and management tool, allowing sustainable collection of economically valuable species. Establishment of park non-timber natural resources and medicinal plants management model. Determination of commercial NTFP/NTNR resource localities.</p> <p>What produced: GIS database for the park natural resources and medicinal plants. GIS information layers, production of 1: 25 000 and 1: 50 000 maps; Draft TOR for the development of medicinal plants section in the MP; Park Staff (16 people) trained in phaenological monitoring and assessment of medicinal plants</p> <p>Where located: CBNP, with data base and GIS also at NNPS.</p>
20.	3.4	Tourism Management and Information Infrastructure	2002	89670	<p>Purpose: Design, develop and install a system of national parks signage for tourist management, information, and law enforcement purposes. Provide a consistent identity and presentation of the national park values.</p> <p>What produced : 11 all-weather information boards for rest sites; 15 all-weather secondary boards; 8 Information Boards for the NP in the settlements around the parks; 50 Reserve entrance signs; 2 Façade boards for park sections offices; 2 all-weather boards for Information Center and Control checkpoints; 3 double sided road sign boards; 7 façade boards for the park offices; 12 viewpoints; 20 rest sites; 12 all-weather information map-boards for NP main entrances; 15 map-boards for NP secondary entrances; 26 boards with NP text in Bulgarian; 26 boards with NP text in English; 35 all-weather rules boards + 25 in English;</p> <p>Where located: Settlements and localities associated with Park Sections – Divchevoto, Ribaritsa, Troyan, Apriltsi, Stokite, Gabrovo, Tuzha, Kalofer, Karlovo. Klissura</p>
22.	4.6	Tourism Catalog Cherni Ossam	2002	3900	<p>Purpose: Finalize the ecotourism catalogs for major tourism attractions, sites, services and accommodation around the National Park.</p> <p>What Produced – 2 hard-copy and electronic versions of a catalog with updated information for the Cherni Ossam tourism area</p> <p>Where located: CBNPD, Cherni Ossam information center</p>

Pr. No	Park Plan Ref. No	Project title	Year	Cost BGL	Project Summary
23.	1.3	GPS Training	2001.	2211	<p>Purpose: Develop the capacity of Park staff to use and operate global position system receivers and to introduce this technology into their park management systems and GIS digital model.</p> <p>What produced: 14 Park staff trained in operating GPS units, data collection; GIS experts training in use of specialized software geodetic conversions; Development of special software converter – WGS 84 into 1970 format.; GPS - AutoCad software conversion.</p> <p>Where located: CBNPD</p>
24.	1.3	Drawing Zone Borders – Management Plan	2001	1309.54	<p>Purpose: Meet the requirements of the Council of Ministers to supply digital models of the Park Management Zones</p> <p>What produced: Management Zones of the park digitized; Park zones reconciled with cadaster and Park GIS. Digital models – GIS – provided to NNPS and NPD</p> <p>Where located: MOEW and Central Balkan NPD</p>
25.	MP 5.5.7/5.4.1	Biala Reka Camping Area	2002	2180	<p>Purpose: Diversify and develop new visitor infrastructure that supports the national park experience and increases revenue generation activities for local communities and Parks.</p> <p>What produced: Camping area and associated infrastructure including parking areas, latrines, campsites, tables, benches, stools, recreation area, and safety features. Commissioning (concession) mechanism for contracting commercial activities and maintenance of the Biala Reka bivouac site in CBNP pilots first national parks concession and public procurement order.</p> <p>How many: 1 camping area</p> <p>Where located: CBNP – Kalofer PS pilot area – Biala Reka/ Kalofer Ecotourism Association</p>
TOTAL BGL: 153305.81					

Appendix 2

**Memo of the Working Meeting on the
Development and Implementation of Ecological Monitoring System
in the National Parks
20 February 2002, EEA, Sofia**

ARD - Bulgaria
Biodiversity Conservation &
Economic Growth
Project

Sponsored by
USAID and the Government of Bulgaria

55 Parchevich Street, 3rd floor, 1000 Sofia

tel./fax: (+359 2) 986 7418; 986 3686; 986 3846; 980 7240

Development and Application of National Parks Ecological Monitoring System

Workshop – Environmental Executive Agency
20.02.2003, Sofia

Summary

Objects of the meeting:

1. To confirm the objectives and purpose of an ecological monitoring system for Bulgarian National Parks.
2. To review the concerns and comments of the NNPS and EEA concerning elements of the proposed ecological monitoring framework for the National Parks – both geographical areas, and species monitoring components.
3. To develop operational, practical links between the Regional Inspectorates for Environment and Waters and the Directorates of the National Parks, for monitoring of the abiotic elements in the Parks and to outline the next steps for their implementation.
4. To outline further steps for implementation of monitoring programs for additional, specific components of the Ecological Monitoring Program.

Participants:

1. Krasimira Avramova - EEA
2. Ivanka Todorova – EEA
3. Svetoslav Cheshmedzhiev - EEA
4. Mihail Mihailov - NNPS
5. Ivailo Zafirov – NNPS
6. Nela Rachevitz - CBNP
7. Svetoslav Todorov – CBNP
8. Vasil Petrov – RNP
9. Verka Ivanova – RNP
10. Blagoi Klecherov – RNP
11. Ivailo Iconomov – PNP
12. Peter Hetz – BCEG Project
13. Dimitrina Boteva – BCEG Project

Discussion Results

Summary

1. EEA and NNPS expressed their satisfaction that the proposed for the National Parks Ecological Monitoring System answers the primary needs of a national biodiversity monitoring system and is a positive step towards contributing to a national model for all protected areas in the country. The proposed scheme was evaluated as a good framework that can be adapted and used in the evolving national biodiversity monitoring system at national level.
2. The individual efforts of RNP and CBNP Directorates to prepare ecological monitoring components and their presentation in monitoring matrices were evaluated as an important step towards accomplishment of their Management Plans objectives.
3. All participants confirmed that the Parks' Ecological Monitoring system serves a practical tool and that it addresses management tasks for each National Parks. Selected monitoring components will be included in a National monitoring system and the information will be submitted to EEA in a format to be specified by the Agency. Specific sample stations for several monitoring components (water, soil and etc.), will be added to the national monitoring network, as at present, no such sites exist in the National network. The stations in the Parks will serve as control stations. These stations will provide primary information fundamental to all ecological monitoring systems, and serve as control points for ecosystems and territory that has minimal direct, negative impacts or interference.
4. The Ecological Monitoring System for the three Parks should be unified in terms of "major components, methodologies, reporting formats, and periodicity. This must be developed at a practical level. The EEA and NNPS should be provided with detailed information on "how and what" information is collected in each of the Parks. Each National Park Directorate (NPD) will maintain and keep the basic (primary) information; the EEA will periodically receive reports.
5. Abiotic component monitoring (soils, rain, water quality). The RIEW will collect samples at prescribed points, provide laboratory analysis, data interpretation, and summarization. The National Park Directorates will provide assistance through Park Rangers during sample collection. The results of these monitoring efforts will be provided by the RIEW to the EEA and the Directorates.
6. Financing of the abiotic monitoring activities, which depend on RIEW/EEA assistance, are recommended to come from the budgets of the Park Directorates. These funds will be managed by NPD and will be reported against annual plans for monitoring of abiotic components in the parks. This money will be obligated by the NPDs to cover the costs of RIEW monitoring activities on each Park territory. Budgets will be developed, in the first instance, by the relevant RIEW and NPD as a joint activity. Subsequent budgets will be based on periodic reviews of methodology, analysis and costs.
7. Monitoring methodologies that have already been developed with the assistance of the BCEG Project, will be submitted to NPD, NNPS and EEA. Methodologies will be used on an experimental basis for 3-5 years in the national parks. If the efficiency and

applicability of the methodology is proved, the methodology will be approved through a final review and approval process at the MOEW.

8. The component "Heavy metal accumulation" as a separate monitoring component will be eliminated from the National Parks Ecological Monitoring Matrix. This component is sufficiently covered as soil and rain monitoring and analysis. If deemed necessary, heavy metal accumulation tests will be conducted on concrete places and objects.

Planned activities

Activities	Dead line and responsible person
1. Develop a Protocol with the requirements of EEA for the monitoring components, their periodicity, and the monitoring result submission form from NPD to EEA.	20 March, Madlen Pavlova
2. Review the methodologies and instructions (developed with the assistance of the BCEG Project., and confirm the appropriate reporting formats that will be used and recognized by the EEA.	20 March, Madlen Pavlova
3. Add Soils, Rain, and water quality, and their exact collection methods, analysis parameters, periodicity, etc. to the Ecological Monitoring Matrix for the National Parks.	7 March, Madlen Pavlova
4. Organize working meetings between NPD, EEA and the corresponding RIEW to develop the program and organization of the abiotic components and samples sites for soil, rain and water quality for monitoring for each Park.	Indefinite EEA, NPD
5. Organize a working meeting between Rila NPD, EEA and INRNE for discussion on terms, ways and format for submitting the monitoring data from Musala Basic Ecological Laboratory from INRNE to NPD and EEA.	Indefinite EEA, "Rila" NPD
6. Develop status reports for each of the Parks for existing stations for rain quantity and quality estimation using information from IHM, BAS stations, and etc. The information will be submitted to EEA for review and a determination of what is necessary to assure data compilation and sharing for information needs of each NPD.	20 March NPD
7.1 Develop a detailed description of the proposed monitoring regions in each park and provide a clear rationale and set of objectives for including a variety of monitoring objects in each region.	7 April NPD Dimitrina Boteva/BCEG
7.2 Prepare a reference for each of the monitoring components for which there is no methodology developed. These remaining components will be prioritized in according to the needs of the NPD.	

8. Provide a more detailed description of the methodologies developed with the assistance of the BCEG Project and recommendations for their requirements/conditions for assuring correct application of the methodologies in order to obtain reliable results.	12 March Dimitrina Boteva
9. Format and submit the final version of the matrices and methodologies for ecological monitoring in the National parks to NPD, NNPS and EEA, developed under the BCEG Project.	30 April Dimitrina Boteva

Prepared by: D. Boteva
28.02.2003

Appendix 3

**Draft Management Concept
for the Territory of the Rila Monastery Nature Park**

Rila Monastery Nature Park

Concept – New management mechanisms for a special protected area.

1. Purpose

To develop a management mechanism that effectively incorporates the desires and responsibilities of a private landowner (Rila Monastery) within a protected territory of national and international conservation and cultural significance, and to streamline the functions of multiple government institutions on the territory.

2. Background

Since it was excised from Rila National Park and re-categorized as a nature park (IUCN Category IV protected area) in March of 2000, the Rila Monastery and its surroundings have been carefully studied as part of the preparation of a protected area management plan. The resulting values of this territory are significant. The concentration of rare and protected species of plants and animals on this relatively small territory shows that the Park is with higher conservation significance than the Rila, Pirin and Central Balkan National Parks. The combination of natural, historical and cultural value associated with this territory is without rival in Bulgaria, the Balkans, and Europe. The territory offers excellent opportunities for tourism development which both benefit the region locally, as well as the country. Central to the plan's development is the preservation of the religious and conservation significance of the territory. In addition, this area includes the single largest piece of private land restoration in the nation the Rila Monastery claims traditional title of this territory, and their restitution claims are largely complete. There is no precedence or experience in Bulgaria, however, for managing a national protected area, of which some 90% is restituted to a private landowner.

The Ministry of Agriculture and Forests has recently applied for a change in the boundaries of the Nature Park, to include all territory being restituted to the Monastery. This proposal reflects the desires of the Abbot of the Rila Monastery. Proposed boundary changes increase the size of the total territory with 760,3 ha.

2.1 Stakeholders

The territory includes 8 major stakeholders – (1) the representative of the Bulgarian Orthodox Church (the Abbot of Rila Monastery), the (2) Rila Monastery Nature Park Directorate and (3) State Forest Enterprise representing the MOAF, and the (4) Rila National Park Directorate representing the MOEW, (5) the Regional Environmental Inspectorate, the (6) Institute for Cultural Monuments representing the Ministry of Culture, the (7) Blagoevgrad Office of Dams and Cascades, and the (8) Rila Municipality.

2.2 Existing Roles

The Abbot of Rila Monastery manages daily aspects of the Monastery and areas of spiritual and cultural significance. As representative of the Church he also takes decisions on the management and husbandry of all Monastery lands included in the Park territory. By law, his actions are guided by two institutions – the Institute of Monuments of Culture for the sites of cultural significance, and the Ministry of Agriculture for the matters related to resource husbandry.

The Rila Monastery Forest Reserve is guarded and managed by the Rila National Park Directorate. By law, strict nature reserves are supervised by representatives of the Ministry of Environment and Waters, unless otherwise noted.

The State Forestry Unit, Rila, provides technical supervision of all natural resource husbandry issues on the territory, as well as guarding and law enforcement on the Park territory.

The Rila Monastery Nature Park Directorate, a staff of 5 individuals, supervises nature conservation activities on the territory.

The Regional Office of Dams and Cascades operates the electrification infrastructure and water harvesting channels within the territory.

All activities related to resource husbandry on the territory, and those with an environmental impact, are supervised by the Regional Environmental Inspectorate, Pernik.

Rila Municipality is the gateway (entrance) community to the Nature Park and Monastery. Activities inside the Park can affect activities and services outside the Park. Development plans and activities outside the Park will also have some bearing on what happens inside the Park. Therefore, links with the municipality of Rila are necessary for better coordination on matters such as water supply, electricity generation, communications, traffic control, employment, security, and enterprise development.

There are numerous additional private and state activities conducted on the territory of the Park, primarily in favor of tourism, and on a relatively small scale. These are largely not managed and supervised by any authority.

2.3 The Territory as an Attraction

The Rila Monastery and its surroundings receive at least half a million visitors a year. This makes the monastery and the nature park the most heavily visited protected area in the country after Vitosha Nature Park.

2.4 Role of Management Plans

Park management plans are legal tools for guiding activities and investments on territories of national and international significance. A protected area management plan provides a framework for all activities within a protected area. It describes the purpose and significance

of a territory and describes measures that should be taken in order to fulfill the purpose of the territory, and to maintain its significance. In order to do this, a park management plan describes long-term and management objectives. Objectives are what govern all decision making on the territory. The first interpretation of objectives is realized in “management zones” – areas of land that are designated based on the resource values and in keeping with the ideal objectives. Within each zone, plans prescribe appropriate regimes and norms. Regimes and norms are based on scientific information, best practices, and the objectives of the Park. Regimes and norms almost always err on the side of conservation of natural and cultural values. Management plans areas are required for all territories designated as protected areas in the nation.

Rila Monastery Nature Park has a management plan developed with the assistance of the United States Agency for International Development (USAID). Like all park management plans, it is valid after expert opinion, public review, and a decree of the Council of Ministers. Once approved, the plan is valid for a period of 10 years. Park management plans govern the following activities on the territory: tourism development and management, education and interpretation, specific natural resource management and consumption, research and monitoring, and historical, cultural, and spiritual sites, as necessary.

Natural resource extraction within a park is governed by a separate natural resource management plan. This hold true for forests and for non-timber natural resources.

The Terms of Reference for Rila Monastery Nature Park Management Plan guides the content of the Plan. The Ministry of Environment and Waters in consultation with the Ministry of Agriculture and Forests approve these Terms of Reference.

3. Challenge

Management planning conducted to date illustrates the importance of harmonizing the future management of the Monastery and its holy sites with their surroundings. It also illustrates the need for coordination and concrete links between the Nature Park and the surrounding Rila National Park, as well as the scientific and tourism sectors.

Since both natural and spiritual elements of the area are of national and international significance, and because this territory has Government and Church ownership, special supervision and management of the territory is required. The goals and management objectives for this territory fall well outside the purview of one Government agency or landowner. To effectively manage this Nature Park and in recognition of the rights and responsibilities of its special landowner, new management mechanisms must be employed.

4. Proposal

The Park’s values and significance require the formation of a new type of management mechanisms that can address the interests and responsibilities of Church, State, local authorities, and the public in this exceptional area. The following mechanisms are proposed as part of the full management concept for Rila Monastery Nature Park, and should be the

subject of discussion and negotiations between stakeholders representing Government and those representing the Bulgarian Orthodox Church. The mechanisms can include:

- Rila Monastery Nature Park Advisory Board
- Rila Monastery Nature Park Management Council.
- Rila Monastery Nature Park Executive Team

Establishing the Mechanisms

Given the national and international significance of the territory, its special status must be confirmed at the highest levels. A regulation issued by the Council of Ministers establishing the Rila Monastery Nature Park Management Council, to which is attached a Memorandum of understanding between the Church (Bulgarian Orthodox Church Synod) and the Bulgarian State (Council of Ministers) The Regulation should establish the council, and the MOU could include:

- a statement regarding the purpose (ideal objectives) of this territory,
- Recognition of the Nature Park Management Plan as the tool that guides investments (the allocation of state money and Church investments) and activities on the territory;
- recognition of the specific status of the strict nature reserve – Rila Monastery Forest Reserve;
- Recognition of the boundaries (existing and proposed) /of the Nature Park and the amount of Church land contained within it;
- an indication of the broad role of the GoB and the Church in maintaining and supporting the major activities on the territory (financial and technical);
- Establishment of the composition and roles of the three management mechanisms .
- Recognition of the roles and responsibilities of Government and Church stakeholders.

5. Proposed Roles and Responsibilities

5.1 Bulgarian Orthodox Church

- Maintain and operate holy and sacred sites in the manner for which they were originally intended;
- Provide regular and free access to these holy sites for pilgrims and the general public;
- Develop guidelines for visitor access and behavior based upon the canons of the Bulgarian Orthodox Church;
- Maintain these sites in a state that reflects their national and international significance, and within the provisions for such sites, as provided by the Ministry of Culture, and in association with the provision as a World Heritage Cultural Site;
- Provide an annual plan, budget, report and accounting for moneys needed to maintain the sites as sites of national and international significance;
- To undertake activities that are in compliance with the Nature Park Management plan.
- Provide an annual plan, budget, report, and accounting for additional activities undertaken by the Church in conjunction with the Nature Park Directorate.
- Agrees to use the Advisory Board as a conflict-resolution mechanism acceptable to both parties that will be used to settle and arbitrate disputes between parties;

5.2 Government of Bulgaria

- Maintain a minimal level of annual assistance (subsidy) and support of the Rila Monastery and the Rila Monastery Nature Park in order to ensure basic operations and services for a site of national and international significance;
- To undertake activities only as a part of the Nature Park Management plan and only with the concurrence of the Park's Advisory Board;
- Provide basic law enforcement and guarding as part of its operations, and at no expense to the Rila Monastery. This will be considered as part of the annual operational subsidy;
- Agrees to use the Advisory Board as a conflict-resolution mechanism acceptable to both parties that will be used to settle and arbitrate disputes between parties;
- Make as a priority, the fair and reasonable restitution of all-church property and land within the restituted territory, including properties on Church lands.

6. Adoption of the Rila Monastery Nature Park Management Plan.

Each successive Rila Monastery Nature Park management plan will be the primary tool for guiding the development and management of the Monastery sites and territory, and natural resources and biodiversity found within it. It will be used as the framework for agreeing all activities deemed in keeping with the territory's significance and purpose.

7. Management Mechanisms

7.1 RMNP Advisory Board

The RMNP Advisory Board shall be constituted of 2 Bulgarian Government representatives, and 2 Church Representatives, and 1 international representative. (One representative from either the World Heritage Committee, IUCN, WWF, or Alliance of Religions and Conservation)

The purpose of the Advisory Board will be to:

- To ensure the relationships between the cultural, spiritual and natural values of the territory are maintained according to the purpose and significance of the territory;
- Ensure the MOU is implemented and observed;
- Raise funds as necessary, in support of objectives and programs important for the territory;
- To assess and audit the activities and performance of the Rila Monastery Management Council and its Executive Committee.
- Review and approve annual budgets;
- Review and approve large or long-term contracts and fee generating mechanisms;
- Lobby for annual government subsidies for the Park and Monastery.
- Review and approve an annual report and ensure its release to the public.

7.2 RMNP Management Council

The Management Council will have as its purpose to coordinate the implementation of all activities of the Nature Park management plan. The Management Council will:

- ensure that all activities are carried out in compliance with the law, and within the context of the Nature Park management plan;
- Review the annual implementation plans and budgets of all stakeholders with responsibilities on the physical territory of the Park
- Review the operational plans of the Executive Committee for the Nature Park, that are prepared in response to the objectives and programs of the management plan;
- Decide on the mechanisms that are needed to ensure coordination and communication between authorities and projects inside the Park with those outside, and vice-versa.

Composition of the Management Council

- The Council should include a representative of the Rila Monastery as appointed by the Bulgarian Orthodox Church. He will be considered the chair ;
- A representative of the Rila Monastery Nature Park Directorate;
- A representative of the Rila National Park Directorate;
- A representative of the Ministry of Culture – Institute of Monuments of Culture;
- A representative of the Rila Municipality;
- A representative of Dams and Cascades;
- Regional Environment Inspector responsible for biodiversity.
- A representative from the Bulgarian environmental NGO community
- A representative from the Bulgarian biodiversity research community
- A representative from the Pirin Tourism Forum, or similar regional tourism council

7.3 Executive Committee

An Executive Team will be formed and responsible coordinating activities in the Nature Park on a day-to-day basis, as needed. This team will assure that annual operations plans are implemented according to the roles and responsibilities of stakeholders. They will coordinate with each other to assure general compliance of stakeholders, organizations, and companies with the Parks's rules and regulations. Team members will be drawn from the Monastery and the Nature Park Directorate.

Since large-scale programs, projects and activities on the territory will be undertaken by competent organizations, agencies and companies, the Executive Team will be responsible for assuring compliance with proposals, action plans, and environmental mitigation measures. Organizations and companies operating inside the Nature Park should perform to exact standards and rules of conduct. These professionals should be appointed based on a competitive procurement process. The Rila Nature Park Management Plan identifies which activities could be performed under such contracts. Examples include commercial forest extraction and tourism development.

8. Frequency and Purpose of Meetings

8.1. *The Advisory Board* will meet on an annual basis to oversee the success of the Council, the management plan, and the operating mechanisms. They will conduct an annual assessment of the Council's operations, and the performance of the Executive Committee. After five years, and successful auditing, the Advisory Board will assess performance every two years.

The role and costs associated with an independent, international body (one representative from either the World Heritage Committee, IUCN, WWF, or Alliance of Religions and Conservation) should be agreed with each organization in advance, and the best organization chosen to participate.

8.2 *The Council* will meet at least twice during a year to review annual operations plans and budgets. They will also meet to review the reports prepared at the end of the year according to each members' individual roles, functions, and networks related to the territory. Their comments and concerns will be passed to the Advisory Board as a matter of record from these meetings.

8.3 *The Executive Committee* will meet on a monthly basis, and more often as necessary, to ensure the smooth operation of annual work plans, activities, and expenses. Records of these meetings will be taken for purposes of transparency and referral.

**ARD-Bulgaria
Biodiversity Conservation & Economic Growth Project**

Appendix 4

Summary of the Ecotourism Innovation Projects

SYNOPSIS

**of 12 Winning Entries of the
Innovative Projects Exhibition & Contest
National Ecotourism Forum
Sofia, October 2002**

1. Project Name: Open-Air Eco-Museum

Contractor: **Vrachanski Balkan Nature Park Directorate.** Established in 1996 as a unit of the National Forestry Board under the Ministry of Agriculture and Forests, the Directorate is active in the study and protection of biodiversity in the Park's territory; in building and maintaining the infrastructure; in providing conditions for the development of tourism.

Time frame: 18 months

Budget: 66,290 leva, of which the organization contributes: 8,520 leva.

Project objective: To provide conditions for the development of ecotourism in the territory of Vrachanski Balkan Nature Park, thereby creating a qualitatively new ecotourism product based upon the existing attractions within the Park and the surrounding region, by providing incentives to and stimulating partnerships among local businesses.

Expected results: Improved conditions for sustainable development of ecotourism; laying the foundations for a long-term strategy for ecotourism development in the region.

Principal activities: Drawing up an inventory of the sites and attractions; development of two pilot cyclical routes featuring the respective exhibits to be included in the Eco-Hall; improving and upgrading the infrastructure around attractions; issue of promotional materials and development of a marketing strategy for each route; promotion of the Eco-Museum; encouraging partnerships among local entrepreneurs.

2. Project Name: Development of Ecotourism in Rousenski Lom Nature Park

Contractor: **The Ecotourism Association, Rouse.** A non-governmental organization established in 2001 to assist in the development and implementation of local policies in the tourism area, the Association is engaged in educational activities and promotion of the local tourism product.

Time frame: 10 months

Budget: 58,355 leva, of which the organization contributes: 12,607 leva.

Project objective: To provide conditions for ecotourism development in the communities around the Park by identifying and structuring the available resources.

Expected results: Improved quality of the ecotourism products on offer; improved skills of local entrepreneurs in marketing ecotourism products.

Principal activities: Training of local entrepreneurs in the basics of ecotourism and the hospitality industry, in the ways and means of tourism promotion and advertising; development of hospitality programs. Identifying and development of additional attractions at sites related to traditional lifestyle, habits and customs and local culture; marking and signposting of eco-trails; development and issue of promotional materials; presentation of tourism programs to tour operators.

3. Project Name: Protected Areas and Sites: The Hidden Gems of the Rhodope Mountains

Contractor: **The Rhodopes Ecological Organization.** A non-governmental organization involved in the study, conservation and restoration of biodiversity on the Rhodope Mountains, and in assisting the processes of sustainable development of the region.

Time frame: 24 months.

Budget: 164,990 leva, of which the organization contributes: 34,718 leva.

Project objectives: Conservation of the unique biological diversity of the Rhodope Mountains by means of developing sustainable ecotourism, assisting local entrepreneurship and providing conditions for income generation for the local population while improving the ecological awareness and culture of the community.

Expected results: A new, all-round tourism product: a 'cyclical' route that will take tourists through protected areas and reserves in the Western Rhodope Mountains while enabling income generation for local business and environmentalists.

Principal activities: Drawing up an inventory of natural attractions, routes and the state and condition of the existing infrastructure; setting up a database of tourism opportunities and the hospitality base; development of a tourist information infrastructure; marking and signposting of trails; issue of promotional and information materials; training of entrepreneurs and Regional Environmental Inspectorate personnel in the territory of the Western Rhodopes; as well as promotional activities concerning the route: a publicity campaign, guided tour for travel agents and tour operators, participation in tourism exchanges.

4. Project Name: From Ahtopol to Yabalkovo

Contractor: **The Bourgas Rural and Ecotourism Association.** An NGO whose declared aims are related to the development of ecotourism and the provision of new livelihood opportunities for the local population in the Bourgas region. The organization includes among its members both physical persons and legal entities.

Time frame: 8 months.

Budget: 27,414 leva.

Project objective: To improve the socioeconomic situation of the local community through income generation from ecotourism in the Strandja area.

Expected results: Ecotourism routes are to be created on the basis of protected sites and areas in the southern coastal region and Strandja Mountain.

Principal activities: Drawing up an inventory of tourism resources in and around the protected areas of Strandja Mountain; study and description of routes; issue of promotional materials; organizing promotional tours; training of local entrepreneurs; setting up of local ecotourism societies; developing of a program for ecotourism development in Strandja Mountain and the southern coastal region.

5. Project name: Protected Areas: A Source of Live Water for Tourists and the Community

Contractor: **Society for the Development of Etropole Municipality – Etropole Tourism Board.** A non-governmental organization committed to the sustainable economic and social development of Etropole Municipality and the promotion of tourism activities.

Time frame: 12 months.

Budget: 65,000 leva, of which the organization contributes: 9,500 leva.

Project objective: To provide conditions for the development of ecotourism in and around the Bachishte and Belikasha protected areas in the Etropole section of the Balkan Mountain. The project aims to create an all-new tourism product targeted at people with disabilities.

Expected results: Increased public awareness of ecotourism opportunities in and around the Bachishte and Belikasha protected areas; providing conditions for increased prosperity of the local population; developing a model for inclusion of people with disabilities in environmental uses.

Principal activities: Developing a tourism package for protected areas; creating routes adapted to people with disabilities; setting up specialized facilities to enable access of disabled citizens to the hospitality infrastructure; marking and signposting of routes; training of guides; organizing a promotional tour for the media and an educational tour for the community, involving nature lovers; publicity and promotion of the routes.

6. Project name: In Peace with Nature, to Improve Our Contacts with It

Contractor: **The Rila Ecotourism Association.** A non-governmental organization founded between private entrepreneurs, the local government authorities and the management of Rila National Park in order to promote ecotourism in Samokov Municipality and the gateway communities.

Time frame: 12 months.

Budget: 78,020 leva, of which the organization contributes: 13,680 leva.

Project objective: To enrich, diversify and complement the ecotourism product in the area of and around Rila National Park by developing a new attraction: a specialized cycling route, and organizing a special promotional event for the proposed bicycle track.

Expected results: An eco-product targeted at tourists who are also mountain biking enthusiasts: an ecological bicycle track as an alternative form of ecotourism. As a side effect, this will help regulate the influx of mountain bikers into the territory around of Rila National Park.

Principal activities: Exploring, planning and development of a specialized route for mountain bikers in the territory of Rila National Park; provision of measures for ensuring the safety of the route; development and setting up of specialized infrastructure; organizing and hosting a national mountain biking contest; development and issue of promotional materials; training society members for contacts with the media; activities aimed to attract sponsors. The project also envisions the setting up of a Friends of Nature and the Park Fund, as well as developing a procedure for route management.

7. Project name: Integrated Development of Ecological and Cultural Tourism in the Protected Area of Rousenski Lom Nature Park

Contractor: **The ICOMOS Bulgarian National Committee.** A non-governmental organization active in the field of cultural heritage, ICOMOS cooperates with the public sector in conservation and publicizing of Bulgaria's heritage.

Time frame: 18 months.

Budget: 350,000 leva, of which the organization contributes: 50,000 leva.

Project objective: Improving the quality of the territory as a unique 'cultural landscape'; developing a model for sustainable eco- and cultural tourism.

Expected results: A model of a management policy and investment strategy for cultural tourism in the territory; a mechanism for partnership and tapping new resources; the territory is to be nominated for inclusion in the network of European cultural routes and the trans-boundary network of nature parks.

Principal activities: The project envisions the setting up of a digital database of the natural, cultural, tourist and other assets and sites in the territory of Rousenski Lom Nature Park; development of a management plan for the conservation and interpretation of the territory; development of a package of six programs and management model for the eco- and cultural tourism in the territory; design and production of multi-media sources; education and public awareness programs concerning the cultural heritage. Another range of activities include setting up a local council for eco- and cultural tourism and support of partnerships in this sphere, as well as organizing of special events.

8. Project name: The Periwinkle Festival

Contractor: **The Strandja Nature Park Directorate.** Strandja Nature Park is the only protected area in Bulgaria that has populated communities in its territory. The Park's management office was set up in 1995, and in 1998 was transformed into a Park Directorate reporting to the Ministry of Agriculture and Forests

Time frame: 5 months.

Budget: 42,250 leva, of which the organization contributes: 7,270 leva.

Principal objective: To provide adequate conditions for the sustainable development for the area of and around Strandja Nature Park

Expected results: The Project aims to support the sustainable development of the area of Strandja Nature Park by providing conditions for the development of ecotourism on the basis of the park's attractions. The result of that will be the setting up of seven tourist routes, the training of local people to be tourist guides, and the promotion of a special event to become traditional in years to come.

Principal activities: Preparation for and organizing of a special event: the Periwinkle Festival, after the plant that is the symbol of Strandja Mountain. The idea is for the festival to become a focal point where experts, students and tour operators would draw information about the region's natural resources and attractions, and the possibilities for ecotourism. Steering committees are to be set up at all communities within the Park's territory; this will take place in parallel with a public awareness and marketing campaign; this will include printing of promotional and publicity materials, and an ecotourism exhibition within the framework of the festival. In addition to the activities related to the special event, the organizers will explore, mark and signpost educational routes within the park's territory.

9. Project name: Ecology and Survival in the Wild Skills Training Center

Contractor: **The Central Balkan Ecotourism Association, Kalofer.** An NGO founded between private entrepreneurs, the local government authorities and the management of Central Balkan National Park in order to promote ecotourism development in the Park and the surrounding area.

Project objective: To enrich, diversify and complement the product of the Ecotourism Association based upon the opportunities in the area of and around Central Balkan National Park, by means of setting up a special facility: a training camp.

Time frame: 10 months.

Budget: 72,050 leva, of which the organization contributes: 9,950 leva.

Expected results: A tourism product is to be created on the basis of the possibilities for education within the Park; simultaneously, new opportunities for income generation for the

local community will be created. The campsite in the territory of Central Balkan National Park will be used as a training camp and for publicizing the natural heritage.

Principal activities: The project envisions the setting up of a training camp in the territory of Central Balkan National Park, fitted out with special infrastructure and facilities. This will include setting up a lecture theater at the Information Center of the association; development of a curriculum and teaching aids; training of a team of local people to be lecturers and instructors at the camp; printing of publicity and promotional materials; organizing a pilot course leading to the approval of the survival in the wild training program; developing a mechanism for the regulated management of the training camp.

10. Project name: Eco-Trail to the Goritsa Waterfall and Sokolov Izged

Contractor: **The Sapareva Banya Tourism Board.** A non-governmental organization aiming to improve tourist services in Sapareva Banya Municipality, which is one of the gateway communities to Rila National Park, the Board was established in 1999.

Time frame: 10 months.

Budget: 56,400 leva, of which the organization contributes: 13,050 leva.

Principal objective: Development of an ecotourism product in the area of Sapareva Banya Municipality by setting up an eco-trail in the territories of the Municipality and of Rila National Park.

Expected results: Development of an enriched and diversified ecotourism product based upon the proposed eco-trail, which is to be incorporated into a larger-scale project planned for the region, turning into a new attraction based upon the National Park's natural heritage.

Principal activities: Exploring, identifying, developing and providing safety measures for the eco-trail; developing and installing special facilities and an information infrastructure along it; issue of a promotional leaflet; publicity and promotion of the eco-trail and developing a management mechanism for the new attraction.

11. Project name: Nature for All

Contractor: **The Zlatni Piassatsi Nature Park Directorate.** Established in 1996 as a unit of the National Forestry Board, the Directorate performs park management, conservation and research activities; engages in development of educational programs and PR.

Time frame: 6 months.

Budget: 63,499 leva, of which the organization contributes: 6,085 leva.

Project objective: Development of a new product targeted at people with disabilities and the vision impaired.

Expected results: Adequate conditions for inclusion of disabled (in wheelchairs) and vision impaired individuals on an equal footing by taking advantage of a specially developed tourist route

Activities: Exploration, design and building of the route in the territory of Zlatni Piassatsi Nature Park; provision of safety measures, development and installing of specialized visitor infrastructure; publicity and promotion of the route; organizing of a special inauguration event.

12. Project name: Eco-Trails in Pirin Mountain

Contractor: **The Pirin Tourism Forum.** A non-governmental organization established by representatives of the municipalities included in Blagoevgrad Region, NGOs and of Pirin National Park in order to assist the sustainable development of tourism in the Pirin region.

Time frame: 18 months.

Budget: 95,790 leva, of which the organization contributes: 9,207 leva.

Project objective: To create a quality tourism product based upon the rich natural heritage and assets of Pirin National Park and the adjoining territories, as a mechanism for conserving its heritage.

Expected results: Thematic ecotourist routes around each of, and between 8 communities located within the zone adjoining Pirin National Park. In parallel with the development of these, ecotourism packages and recreation programs are to be developed for visitors.

Principal activities: visits to the communities, selection and marking of routes and additional attractions, consultancy services to local people; packaging of products; marking and safety along tourism routes, training of guides, development of interpretative lectures, urgent infrastructural improvements in all 8 communities, design and issue of publicity and information materials; trial runs of the routes with tour-operators and the media.

**Ecotourism Innovation Projects
Financial Reports**

Organization: Vrachansky Balkan Nature Park

Project 1: "Eco-museum" in the Open

1. Transportation	659,10
2. Per diem and meals	488,00
3. Accommodation	69,55
4. Communications	105,43
5. Office materials	207,11
6. Consultant fees	463,00
Total	1 992,19 BGL

Organization: "Russe tourism council" Association

Project 2: Ecotourism Development in the Roussenski Lom Nature Park

1. Transportation	330,00
2. Per diem and meals	60,29
3. Accommodation	240,00
4. Communications	138,92
5. Office materials	51,16
6. Consultant fees	1 180,00
Total	2 000,37 BGL

Organization: Rhodopes Youth Ecoorganization

Project 3: Protected Sites – the Hidden Pearls of Rhodope Mountains

1. Transportation	331,23
2. Per diem and meals	313,10
3. Accommodation	308,40
4. Communications	148,25
5. Office materials	153,82
6. Consultant fees	750,00
Total	2 004,80 BGL

Organization: Bourgas Ecological and Rural Tourism Association

Project 4: From Achtopol to Yabalkovo

1. Transportation	479,06
2. Per diem and meals	750,86
3. Accommodation	146,20
4. Communications	294,36
5. Office materials	199,58
6. Consultant fees	170,00
Total	2 040,06 BGL

Organization: Tourism Council – Etropole

Project 5: The Protected Zones - a Spring of Life, Providing Water for the Tourists and the Local Community

1. Transportation	156,56
2. Communications	117,27
3. Office materials	315,98
4. Consultant fees	1 420,00
Total	2 009,81 BGL

Organization: Rila Ecotourism Association

Project 6: In Peace with Nature - Improving the Opportunities for Contact with Nature

1. Transportation	93,00
2. Per diem and meals	65,90
3. Accommodation	18,00
4. Communications	213,54
5. Office materials	1 212,10
6. Consultant fees	400,00
Total	2 002,54 BGL

Organization: ECOMOS Bulgarian National Committee

Project 7: Complex Development of Ecological and Cultural Tourism in the

1. Transportation	44,00
2. Per diem and meals	48,00
3. Accommodation	38,00
4. Communications	270,00
5. Office materials	299,60
6. Consultant fees	1 300,40
Total	2 000,00 BGL

Organization: Strandja Nature Park Directorate

Project 8: Organization of Periwinkle Festival

1. Transportation	797,44
2. Per diem and meals	173,10
3. Office materials	838,90
4. Consultant fees	190,00
Total	1 999,44 BGL

Organization 9: Central Balkan Ecotourism Association - Kalofer

Project: Center for Eco and Survival Training in Nature

1. Transportation	223,76
2. Per diem and meals	577,35
3. Accommodation	70,00
4. Office materials	46,00
5. Consultant fees	1 060,00
Total	1 977,11 BGL

Organization: Tourism Council – Sapareva Bania

Project 10: Eco Trail to the Goritsa Waterfall and Sokolov Izgled

1. Transportation	
2. Per diem and meals	
3. Accommodation	
4. Communications	75,10
5. Office materials	489,70
6. Consultant fees	1 450,00
Total	2 014,80 BGL

Organization: Zlatni Piassatzi Nature Park Directorate

Project 11: Nature for All

1. Transportation	277,77
2. Per diem and meals	466,60
3. Accommodation	120,60
4. Communications	70,00
5. Office materials	111,03
6. Consultant fees	954,00
Total	2 000,00 BGL

Organization: Pirin Tourism Forum

Project 12: Ecotrails in Pirin

1. Transportation	90,00
2. Per diem and meals	420,00
3. Accommodation	70,00
4. Communications	150,00
5. Office materials	100,00
6. Consultant fees	1 170,00
Total	2 000,00 BGL

Innovation projects total amount

1. Transportation	3 481,92
2. Per diem and meals	3 363,20
3. Accommodation	1 080,75
4. Communications	1 582,87
5. Office materials	4 024,98
6. Consultant fees	10 507,40
Total	24 041,12

Appendix 5

**Feasibility Study Proposal
Submitted by the BCEG Project
to Conservation International**

PROPOSAL: Mediterranean Biodiversity Hotspot Extension within Natural Habitats of Southern Bulgaria**PRESENTED TO: Global Conservation Fund – Conservation International****PRESENTED BY:****National Trust Eco Fund of Bulgaria****In coordination with the:**

- **Institute of Botany -- Bulgarian Academy of Sciences**
- **National Forestry Board, Ministry of Agriculture and Forests**
- **National Nature Protection Service, Ministry of Environment and Waters**

COUNTERPART FUNDING: Regional Environmental Center - Hungary**DATE: January 15, 2003**

Purpose: The purpose of the proposed project is to fill a critical gap in biological information on the Mediterranean *biodiversity hotspot*. The project will provide information indicating whether there is justification to expand the Mediterranean biodiversity hotspot northward into the southern reaches of Bulgaria, and will assist in guiding Bulgaria's protected areas strategy for transboundary ecological corridors.

Justification: Behind the communist era's "Iron Curtain", the borders of Bulgaria, especially with Greece and Turkey, were declared military zones with highly restricted access. The Iron Curtain posed many political, social, and cultural difficulties, and yet it left undisturbed natural habitat in the restricted area during decades of agricultural and industrial development in other parts of the region. For security reasons, scientific studies along the borders between Bulgaria and its neighboring countries were restricted, so little data exists on their natural ecology. There is reason to believe, however, that biodiversity in this region parallels that found in bordering areas of Greece and Turkey, particularly in the river valleys that penetrate northward into Bulgaria from the Mediterranean lowlands to the south (see Figure 1).

Meyers (1988, 1990) defines biodiversity hotspots as those regions with an exceptional concentration of species endemism and species diversity. Medail and Quezal describe the Mediterranean hotspot and the centers of endemism within it in their 1997 paper, *Hot-Spots Analysis for Conservation of Plant Biodiversity in the Mediterranean Basin*. They make three critical points relevant to this proposal: 1) areas of Greece and Turkey that border Bulgaria are a center of endemism within the hotspot; 2) mountain regions within the hotspot present very high levels of endemism, (we note that the southern border of Bulgaria fits this description well); and, 3) political borders should be ignored entirely in designation of a hotspot, (we note that the political border between Bulgaria, Turkey and Greece is the current northern boundary of the hotspot, dividing one and the same geomorphologic structure and ecological entities).

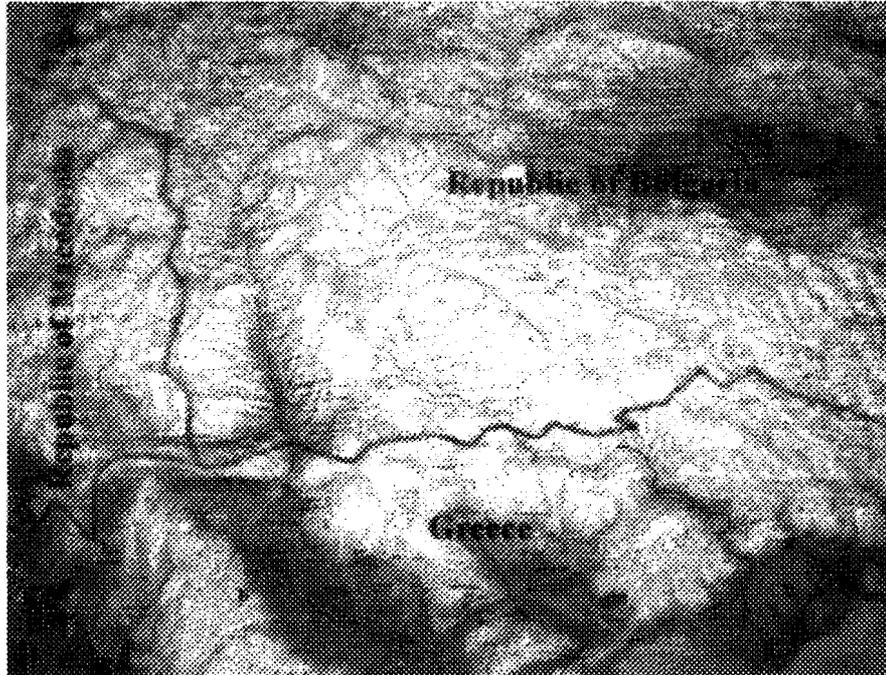


Figure 1: This view of a relief map of Bulgaria, Macedonia, and Greece shows two important features relevant to the Mediterranean biodiversity hotspot: a) river valleys penetrate deep into Bulgaria from the Mediterranean lowlands of Greece [Mediterranean is in lower right corner of image, and its climatic influence follows the main rivers: Struma, Mesta and Maritsa. (Maritsa River is off the picture to the east), which are important corridors for plant and animal distribution]; and b) diverse topography lends to habitat heterogeneity – housing notable relict and endemic species populations.

A major factor that contributes to Bulgaria's high biodiversity is its location at the confluence of three major bio-climatic regions – the mid-European continental, the Eurasian steppe, and the Mediterranean. Geographic placement in combination with complex topographic features, including three major mountain ranges creates a variety of transitional ecosystems and a number of natural habitats that are very rich in relict and endemic plant and animal species. Before beginning our proposed study in the southern and most diverse region of the country, we already know that there are at least 3,700 vascular plant species and 6,500 non-vascular plants and fungi in Bulgaria. It is expected that this project could result in a considerably higher species count in the south of the country, where topographic features and Mediterranean climatic influence are greatest.

A study of the Kresna Gorge of Struma River, in south-western Bulgaria, presents an example of the strong Mediterranean influence and biodiversity richness of southern Bulgaria. Kresna Gorge provides habitat for 80 percent of Mediterranean plant species, including 20 plant species strictly protected by the Nature Protection Act (1967), and 34 rare and six endangered species included in the Bulgarian Red Data Book (1984). A small sample of reptile diversity indicates this area provides habitat for more species than all of Central Europe. (Beron, 2001)

Ten Important Bird Areas (IBAs) have been identified in the region of South Bulgaria and are included in the Important Bird Areas Program of BirdLife International. These sites protect habitats of a significant number of birds, mainly *biome-restricted species* and *species with an unfavorable status in Europe*, according to the criteria used in Europe to identify Important Bird Areas. All together the ten IBAs are important refuges for Mediterranean bird species enriching the biodiversity of Bulgaria.

One of these IBAs in southern Bulgaria includes the Tissata Reserve in Kressna Gorge, along the Struma River. The IBA covers 1450 ha and it is important for its assemblage of Mediterranean – restricted species. The site hosts populations of seven bird species whose breeding distribution is restricted to the Mediterranean biome. In Greece, but on the border with Bulgaria, two IBAs have been designated. The first is situated in the northwest, near the tri-country area of Bellasitsa Mountain (southwestern Bulgaria). The other includes the Central Rhodopes Mountains and Nestos valley. These are extensive areas of forest, gorges and scree slopes, which are well preserved in the border region between the two countries.

The potential for conservation in southern border areas of Bulgaria is unique in Europe and the Mediterranean. Large sections of natural habitat are still intact due to historical restrictions on use and inhabitation. This is in stark contrast to other northern countries of the hotspot that have been impacted by intensive land use, and the southern countries of the hotspot that are coming under intense land use pressure (Meidel and Quezal, 1997). Furthermore, the cost of putting land into conservation in Bulgaria is low relative to many of its Mediterranean neighbors. Indeed, it may be one of the only places where new protected areas are even possible in this part of the world. The four countries sharing this critical set of habitats are recognizing the importance of addressing habitat conservation as a priority. Greece, Macedonia, Turkey, and Bulgaria are exploring the direct links between transboundary habitat conservation and the appointment of new protected areas and special land use treatments. Bulgaria is already exploring this matter with its Turkish counterparts in the border area shared by Strandja Nature Park in southeastern Bulgaria and Turkish territory across the border. The importance of these initiatives is also being recognized under the rubric of “peace parks”, key elements in the geopolitics of the Balkans.

Proposal: We propose to conduct a study that will clarify the scientific extension of the Mediterranean hotspot in the area of Bulgaria adjacent to the border with Greece and Macedonia. The study would be composed of three segments: 1) compilation of existing data within Bulgaria; 2) field study of select areas; and, 3) publication of results and identification of potential transboundary protected areas. This study will be conducted in collaboration with the Regional Environmental Center (REC), Hungary, which will make a counterpart contribution to this effort through its project *Identification of Important Plant Areas (IPA) in the Region Rich of Floristic and Habitat Diversity in Central Europe/Bulgaria*. It will also be coordinated with the Ministry of Agriculture and Forests, National Forestry Board, and the Ministry of Environment and Waters – National Nature Protection Service.

1) Compilation of Existing Data within Bulgaria and Gap Analysis

A number of disparate sources of information relevant to this study must be compiled and synthesized. The information belongs to different institutions, governmental as well as private organizations, such as the Bulgarian Academy of Science, Ministry of Environment and Waters, National Forestry Board, and Agrolesproject Ltd. (former state forestry cadaster and information agency). The first segment of the proposed project will focus on information gathering to compile existing data and to evaluate gaps in order to guide fieldwork.

Twenty experts and technical staff from the Bulgarian Academy of Science and the National Forestry Board will compile and synthesize existing information, and select field study locations. The duration of this phase will be three months. We will conduct a workshop and gap analysis of existing information to help the selection of field study sites. This stage of the project will also be the focus of REC collaboration.

2) Field Study of Priority Regions

The team will conduct Rapid Ecological Assessment, a proven method for our purposes, and one that has been performed successfully in Bulgaria in 2001 during the design of the Rila Monastery Nature Park management plan. Rapid Ecological Assessment uses strategic site selection based on landscape factors, and subsequent species identification at those sites. The method's main strength is its interdisciplinary team approach, allowing various experts to work in unison at the same sites.

The fieldwork will most likely take place in the regions of Belasitsa, the Slavianka Mountains, Struma River Valley, the southern Rhodopes Mountains, and sections of the lower Mesta and Maritsa River basins in Bulgaria. An interdisciplinary team of up to 25 scientists and technical staff will conduct the site visits over a period of approximately six months.



Figure 2. This map illustrates the potential fieldwork areas believed to harbor high levels of biodiversity due to strong Mediterranean climatic influence. Specific locations are noted in the preceding paragraph.

3) Publication of Results and Consolidation of Proposals for New and Transboundary Protected Areas

The interdisciplinary team of scientists will analyze and evaluate the data in terms of species richness, endemism, percentage of Mediterranean and Sub-Mediterranean species present, and risks posed to natural habitat. Within three months the team will submit results for publication in an international peer-reviewed scientific journal, as well as in Bulgaria. The

papers will include a series of recommendations for protected area creation and transboundary corridors along the border of Bulgaria with Greece and Macedonia.

In all instances, counterparts from Greece and Macedonia will be invited to join the Phases 1 and 3 of the project to assure coordination of results on the Bulgarian areas with conservation and land use plans in their respective countries. Contacts and names can be supplied on request.

Project Budget Proposal

<i>Project Segment</i>	<i>Regional Environmental Center</i>	<i>Requested from GCF</i>
Compilation of Existing Data	6,000 EURO	\$ 3,000 \$2,000 Labor \$ 400 Travel \$ 600 Workshops and Misc. Costs
Field Study		\$ 12,500 \$5,800 Labor \$6,000 Travel \$ 700 materials & equipment
Hotspot Redefinition Proposal and Publication of Results		\$ 3,500 \$2,400 Labor \$ 600 Workshops \$ 500 Publication and Misc. Costs
<i>Total</i>		US\$ 19,000

Overview of the Applicants

National Trust Eco Fund

Financial support for this Project will be administered by the Parks Fund, an independent trust fund managed by the existing National Trust Eco Fund (NTEF). The NTEF is an established financial management mechanism prescribed within Bulgarian environmental legislation. It is independent of Government, and yet has strong Government support and participation. The NTEF has demonstrated satisfactory management of more than 20 million SFr of debt-for-nature funds and has jointly managed projects with the Danish Development Agency and The World Bank. It is based in Sofia, Bulgaria;

National Trust Eco Fund Attention: Dimitar Nenkov, Executive Director
67B Shipchenski prohod
1574 Sofia, Bulgaria
Tel+359-2-973-3637
Fax+359-2-973-3818
Email: dnenkov@ecofund-bg.org

Bulgarian Academy of Sciences – Institute of Botany

Founded in 1947, the Institute of Botany is engaged in fundamental and applied research associated with plants, plant systems, dynamics, ecology, genetics, and conservation. There are seven research units at the Institute – Flora and Florogenesis, Phytocoenology and Ecology, Paleobotany and Pollen Analysis, Taxonomy and Ecology of Fungi, Biology and Chemistry of Medicinal and Aromatic Plants, Anatomy and Embryology of Plants, and Hemotaxonomy and Phyto-monitoring. Dr. Dimitar Peev is the foremost conservation biologist/botanist in the country. He is supervising the work of the REC, and will also supervise the Project and all its scientific aspects.

National Forestry Board (NFB)

The NFB is the agency responsible for the national forestry estate, and all Category V Protected Areas (nature parks) in the country. The agency is subordinate to the Ministry of Agriculture and Forests. The management of all national (state) forested lands falls under their jurisdiction. Since the territory under consideration for an extension of the Mediterranean Hot Spot is largely managed and operated under the auspices of this Agency, close coordination will be maintained throughout the Project. Provision has been made for the Agency's direct participation in this work. Any new protected area designation and management will eventually include this Agency and its responsibilities.

Ministry of Environment and Waters (National Nature Protection Service)

The National Nature Protection Service (NNPS) provides supervision and coordination of all biodiversity conservation in the country. Future protected area designation is dependent on the Biodiversity Act, and the Protected Areas Act, both supervised by the NNPS. At present, the Ministry of Environment and Waters supervises the protected area system, and manages all strict nature reserves, nature sites and national parks. Provision has been made for the NNPS' participation in this study. Any new protected area designation based on the results of this work will be supervised by this national biodiversity conservation agency.

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Appendix 6

**Memoranda
of the Two STTA Missions of Jared Hardner
in November, 2002, and in February, 2003**

MEMORANDUM

To	Peter Hetz – ARD Bulgaria Conservation and Economic Growth Project (BCEG)
From	Jared Hardner
Phone	650-964-2000; JARED@HG-LLC.COM
Date	February 10, 2003
Re:	Summary of February 2003 Visit

During the period of February 1-9, I visited Bulgaria to continue support of the creation of a Parks Fund. During this visit, in coordination with ARD staff and the National Trust Ecofund (NTEF), we accomplished the following tasks:

1. Developed coordinated action plan for further development of the fund (see attachment);
2. Met with potential funders for Parks Fund startup (USAID, Swiss Cooperation Office);
3. Composed funding proposal text with NTEF, to be used for Swiss Cooperation Office and other potential donors;
4. Developed presentation on the Parks Fund, to be delivered by ARD to the Board of Directors of NTEF.

For the remaining 1.5 days of this engagement, I will follow up with GEF staff regarding the status of the Parks Fund proposal, and will revise the above-mentioned documents as needed.

Looking forward, I propose to continue engagement with BCEG in the capacity of developing a Parks Fund. I outline this role in the table below.

PROPOSED ROLE IN CONTINUED DEVELOPMENT OF PARKS FUND		
<i>Task</i>	<i>Timing</i>	<i>Output</i>
Develop Strategy for Parks Fund Draft framework Workshop to develop strategy Write draft strategy Workshop to review draft strategy Finalize working version of strategy	April, 2003 May, 2003 May, 2003 July, 2003 July, 2003	Draft logical framework Workshop in Bulgaria w/ stakeholders Draft text of strategy and revised logframe Workshop in Bulgaria w/ stakeholders Final text of strategy and revised logframe
Initial Fund Raising -Work with GEF team	March-Dec, 2003	Complete funding proposal process
Institutional Change Draft TORs for technical personnel	May, 2003	Written TORs for specialist personnel required by NTEF to operate Parks Fund

Action Plan for Parks Fund Setup

<i>Task</i>	<i>Timing</i>	<i>Output</i>
Form Working Group	Completed	Verbal agreement between ARD and NTEF on collaboration, action plan, timing, and responsibilities
Develop Strategy for Parks Fund Draft framework Workshop to develop strategy Write draft strategy Workshop to review draft strategy Finalize working version of strategy	April, 2003 May, 2003 May, 2003 July, 2003 July, 2003	Draft logical framework Workshop in Bulgaria w/ stakeholders Draft text of strategy and revised logframe Workshop in Bulgaria w/ stakeholders Final text of strategy and revised logframe
Institutional Change Governance/legal modifications if required by donors Update administration, if required by donors Endowment management Fund raising Communications and outreach Technical personnel -Biodiversity Specialist -Parks Management -Eco-tourism -Other Update guidelines for project/grant approval	December, 2003 December, 2003 December, 2003 December, 2003 December, 2003 May/December, 2003 December, 2003	TBD TBD Identification of candidate financial managers Hiring of required personnel or consultant Prepare outreach materials and communications plan TORs for required personnel or consultant/ Hiring of required personnel or consultant Procedural guidelines for donors and recipients
Initial Fund Raising USAID/Bulgaria GEF (US\$2 Million) -Secure commitment to support development of strategy -Determine timeline of proposal activities -Collaborate on proposal activities Swiss Government of Bulgaria (US\$ 6.25 million)	March, 2003 March, 2003 March, 2003 March-December, 2003 April, 2003 March/June, 2003	Accept seed funding, if offered Financial commitment from GEF Timeline Completed proposal to GEF Accept seed funding, if offered Renegotiate match to 1:1 / Receive 2003 funds

MEMORANDUM

To	Peter Hetz – ARD Bulgaria Conservation and Economic Growth (BCEG) Project
From	Jared Hardner
Phone	650-964-2000; JARED@HG-LLC.COM
Date	January 31, 2003
Re:	Follow up on November, 2002 Visit

Following a consulting visit of November 18-27, 2002, I spent 2.5 days following up on pending issues. Following are the results of this work.

Specific rules of the Global Environment Facility (GEF) for trust funds

I re-examined the two central GEF documents on trust funds for the environment, *Funds and Trust Funds* and *Review of Experience with Trust Funds*. Both documents outline fundamental principles for trust funds supported by the GEF but do not answer specifically the rules concerning independence of trust governance from host country governments. I followed up via email with conservation trust fund expert Carlos Quintela of WCS and a telephone interview with Gonzalo Castro of GEF. According to these communications, the following issues must be resolved in order for Bulgaria's National Trust Ecofund (NTEF) to receive monies from GEF for an endowed trust:

1. GEF contributions must be matched on a 1:1 ratio with funds from the Government of Bulgaria;
2. The Government of Bulgaria must not have a dominant role in the governing structure of the fund; and,
3. The by-laws of the trust fund must ensure that GEF endowment monies are spent only on recurrent costs of protected areas management.

Procedures for proposals to USAID's Global Development Alliance (GDA).

Upon the encouragement of the USAID mission in Bulgaria and the BCEG Project, I acquired and reviewed documents relating to the GDA, and the potential for using this funding mechanism to support the NTEF's Parks Fund. I created a template for a concept note, to be completed during my next visit to Bugaria. Unfortunately, we learned from the USAID mission in Bulgaria that the GDA office in Washington could not fund the application, but rather only by the USAID mission in Bulgaria, which no longer has sufficient budget for such a proposal. The GDA fund in Washington is not available to Central and Eastern European countries.

ARD-Bulgaria
**Biodiversity Conservation &
Economic Growth
Project**

Sponsored by
USAID & Government of Bulgaria

MEMORANDUM

To	USAID-Bulgaria
From	Jared Hardner, Consultant, and Peter Hetz, ARD-BCEG Senior Team Leader
Date	November 26, 2002
Re:	USAID Follow-up on Parks Fund

Introduction

In November of 2001, USAID's Bulgaria Biodiversity Conservation and Economic Growth Project (BCEG) began the development of a "Parks Fund," an endowment to support protected areas in Bulgaria over the long term. The fund is seen as a legacy of the BCEG project in Bulgaria, cementing the successes of the project in improving protected areas management and related economic activities. This memorandum outlines several possible recommendations, intended for discussion of continued USAID support of the Parks Fund that will ensure that this legacy is secure and provides lasting benefits. NTEF and the BCEG will work to refine these recommendations over the coming weeks.

Parks Fund Overview

Since initiating the Parks Fund endeavor in 2001, BCEG has conducted two parallel efforts, design of the fund's structure and function and exploration of funding opportunities. The experience has been positive in both. First, a potentially viable fund structure has been identified, and second, support from the Global Environment Facility (GEF) and the Government of Bulgaria has been pledged.

Fund Structure

It is our opinion that Bulgaria's National Trust EcoFund (NTEF), established in 1996 as a grant-making entity for funds created by a debt-for-nature swap with the Swiss Government, can house the Parks Fund. NTEF has a proven track record of effective grant making, meeting the exigencies of both the Swiss Government and World Bank. There are, however, several areas that will require further examination, and possible modification to meet donor requirements.

- The current governance of NTEF is composed of a Board of Directors, an Advisory Board, and an Executive Bureau (see Appendix A). As currently constituted, the Directors primarily represent government Ministries, the Advisors are donors (currently only the Swiss Development Corporation), and the Executive Bureau is a technical and administrative group. Therefore, NTEF does not include representation of the intended beneficiaries of the Parks Fund, such as the Parks Directorate or municipalities. A means to provide a voice to the beneficiaries of the fund should be defined, and will involve changes to the composition of the board of directors or advisory committee, and consultative procedures in grant proposal formulation.
- The Government of Bulgaria created the NTEF by statute – it is therefore not registered (or incorporated) as an independent entity in Bulgaria. This may limit the fund’s decision-making autonomy and possibly not comply with donor requirements. This issue must be researched further, and the advantages of registration examined.
- NTEF has not engaged previously in fund raising, nor promoted itself in the international arena. This limited experience with fund raising could be a challenge as the fund must continue to seek new donors in order to meet its endowment objectives.

Funding Possibilities

Our exploration of funding possibilities yielded compelling results. First, we surveyed private foundations in the United States and found that they represent a substantial source of potential funding for conservation that must be pursued aggressively. Second, we obtained a written commitment from the Government of Bulgaria to *match* external funding up BGL 12.5 million over five years. These funds will be available as early as January, with an initial budget allocation of BGL 100,000 to match external contributions in 2003. We will need to work with the Government of Bulgaria to develop a schedule for available matching funds in subsequent years. Third, GEF is considering a grant of US\$ 2 million to begin the Parks Fund endowment. The following months will require a dedicated effort to acquire the GEF grant (see box). Based on our initial funding plan, as presented in the Parks Fund Prospectus, substantial progress has been made.

Funding Plan per *Bulgaria Parks Fund Prospectus*

- | | |
|--|-------------|
| ▪ Government of Bulgaria: 12.5 million leva or US\$6.25 million | (2002-2003) |
| ▪ Multi- and bi-lateral donors: 6.25 million leva or US\$ 3.13 million | (2003-2007) |
| ▪ Private Foundations: 6.25 million leva, or US\$ 3.13 million | (2003-2007) |
| ▪ Domestic private sector: >10% Budget | (2010) |

Box 1: GEF Grant Preparation for Parks Fund

The proposed GEF grant to the Parks Fund is one component of a larger project sponsored by Ministry of Agriculture and Forests focused on management of Bulgaria's forests. GEF grant proposals require several preparatory stages. The first stage, which has been completed, is preparation of a project concept note and request for project preparation funds (PDF Block B Grant). Upon GEF's final approval of the concept and proposal for preparatory funds, World Bank (the GEF implementer) will form a project preparation team. This team will be responsible for detailed development of the GEF grant proposal. At present, project preparation is expected to conclude by September 20, 2003. Final submission of the grant proposal will undergo review by GEF and, under the best circumstances, will result in funding by 2004.

Recommendations for On-Going USAID Support

As the technical assistance and capacity building role of the BCEG project comes to a conclusion, four types of on-going support will greatly assist in ensuring the legacy of the project. First, the Parks Fund will require start-up funding to set in motion its internal processes and foment Bulgarian commitment. Second, the continued stability and growth of the Parks Fund will require assistance in developing its fund raising capacity. Fourth, biodiversity and protected areas expertise will be needed to guide grant design and implementation of the Parks Fund.

Start-up Funding

Start-up activities for the Parks Fund should be designed to ensure a healthy first step in the longer journey of sustained grant support for protected areas. First, the Parks Fund should develop a long-term grant-making strategy through a consultative process with protected areas managers and other stakeholders. The strategy should guide fund involvement in protected areas and provide a basis for grant applications. We recommend a two workshops involving broad stakeholder participation to develop a strategy for the Parks Fund, and a series of general stakeholder consultations over the life of the fund to ensure participatory evolution of the fund. Stakeholder engagement in protected areas work is one of the greater accomplishments of BCEG, but it will be the most challenging to maintain into the future until higher norms for stakeholder engagement are fully embraced in Bulgaria. Continued USAID support in this area is critical.

Second, a series of legal and institutional modifications will be required in order for NTEF to optimize its execution of the Parks Fund. For example, some training and updating of administrative systems will be required to accommodate new donor requirements, and existing legal documents such as the fund's procedural rules may need to be updated. It is also possible that some more extensive legal work will be required to

register NTEF and modify its constitutional documents in order to both comply with the new Environmental Protection Act and GEF requirements.

Third, we recommend that USAID endorse the Parks Fund through a modest commitment of seed capital to the endowment. Beyond the political significance of this gesture, it would trigger the release of Bulgarian co-funding allocated for 2003, for which no external donor is currently committed. An external contribution of US\$ 150,000 will release US\$ 50,000 from the Government of Bulgaria. Furthermore, once the commitment of the Bulgarian Government is concretely demonstrated, we understand that other donors, including the Swiss and UNDP would consider contributions. USAID has the opportunity to catalyze this process.

Fundraising

At the time of the fund's conception, many private donors were retrenching due to a recession in the global economy and declining equity markets. In a prior memorandum, we summarized our survey of the largest foundations in the United States with a history of supporting conservation and trust funds, and found that few were prepared to undertake new projects in regions where they had no prior engagements. The other finding was that many foundations did not view Bulgaria as a conservation priority. As time passes and foundations enjoy a better financial climate, opportunities for grants should improve. Meanwhile, additional work will need to be done to promote a better understanding of Bulgaria's global importance for biodiversity conservation (see box).

At present, prospects look good for the fund to receive US\$ 2.6 million between commitments from GEF and the Government of Bulgaria. Our initial design of the fund calls for a total endowment of US\$ 12 million in order to ensure meaningful long-term support for protected areas in Bulgaria. Naturally, closing this gap will require several years of dedicated fundraising. We propose that USAID, in an effort to secure the gains it has made in the establishment of the Parks Fund, offer support for capacity building in fund-raising. Because there is limited experience in Bulgaria in the field of international fund raising, we propose that an external fund raising specialist be contracted to both assist the fund in fund raising, and to train a new staff member in the methods required to operate a long term fund raising program. The exact structure of this arrangement will depend upon further research of possible options.

Box 2: Fundraising Opportunity

Conservation International, an NGO based in the U.S., recently opened the Global Conservation Fund – a US\$ 100 million grant-making facility for protected areas creation within priority regions for conservation. Priority regions, as defined by the organization, include *biodiversity hotspots* and *tropical wilderness areas*. Bulgaria is currently not included in either category of conservation priority. However, NTEF and the Bulgarian Academy of Sciences is submitting a proposal to Conservation International to review the border of the Mediterranean biodiversity hot-spot¹ and to demonstrate the necessity to include southern Bulgaria in its scope. The current exclusion of Bulgaria is most likely due to historical restrictions on ecological research along its southern border with Greece and Turkey, leaving a data gap yet to be filled. If successful, the study will open the door to funding from Conservation International and possibly other organizations that focus on biodiversity hotspots, and will further justify transboundary protected areas along Bulgaria's borders.

¹ Meidel, F and P. Quezel. 1997. Hot-Spots analysis for conservation of plant biodiversity in the Mediterranean basin. *Ann. Missouri Bot. Gard.* 84: 112-127

Biodiversity and Protected Areas Expertise

As presently staffed, the NTEF's Executive Bureau does not maintain a biodiversity and protected areas expertise for the selection and guidance of protected areas projects. This function will need to be filled in order to fulfill the Parks Fund's objective of providing grants to Bulgaria's protected areas. The profile of a biodiversity specialist would include command of multiple disciplines including conservation biology, parks management, community development, and stakeholder engagement. The biodiversity specialist would be charged with providing an overall direction to grant making in protected areas and, where necessary, call upon the assistance of short-term consultants to assist in the selection and oversight of projects receiving grants from the fund. We propose that USAID provide initial support for this staff position for two reasons: 1) the individual will in large part consolidate the technical capacity currently provided by the BCEG project, facilitating the transition from a well-staffed USAID initiative to long-term installed capacity within the NTEF; and, 2) while a permanent staff position at NTEF will be readily sustained once the fund reaches its planned endowment, present funding makes this position, so critical for early successes of the fund, a significant burden on annual budgets otherwise destined for grant-making.

Summary of Suggested USAID Follow-Up Assistance for Parks Fund

SUMMARY		
<i>Function</i>	<i>Proposed Period</i>	<i>Cost</i>
Start Up Consultative Strategy Legal/Institutional Revisions Seed Endowment	Year 1	\$20k
	Years 2-3	\$20k
	Year 1	\$20k
	Year 1	\$150k
Fundraising	Years 1-3	TBD
Biodiversity and Protected Areas Specialist Labor Equipment	Years 1-3	\$36k/yr \$15k

Next Steps

Next steps for ARD-BCEG Project's work in establishing the Parks Fund will include day-to-day attention to the issues identified in this memorandum and a consultant visit in January. Following is a brief list of planned activities:

- Enlarge and update Parks Fund Prospectus for donors;
- Further examine and propose changes to NTEF Governance;
- Work with Government of Bulgaria to develop a schedule of matching funds allocations over next five years;
- Brief Deputy Ministers on development of Parks Fund and formalize its introduction into NTEF;
- Further develop fund raising strategy for NTEF; and,
- Work with World Bank project preparation team to complete grant proposal and design requirements for GEF

Bulgaria – Biodiversity Conservation and Economic Growth Project

Scope of Work #6, February 2003

Business Development Specialist – Mr. Jared Hardner

Summary

Approval is sought for a consulting level of effort of 10 (ten) days for Mr. Jared Hardner, to continue providing key technical assistance related to the Project. Mr. Hardner's work for the BCEG Project will be conducted during the month of February 2003. Mr. Hardner is considered key personnel under this Project's Task Order (Section F. 6 of IQC No. LAG-I-00-99-00013-00, Delivery Order 001).

Mr. Hardner is expected to continue his assistance to the organization and structure of the Parks Endowment Fund within the National Trust Eco Fund. He will also contribute to the development of NTEF's fundraising strategy and begin a process of defining capacity building needs. He will also continue his work to ensure the Fund's design and operations are in keeping with GEF Conservation Trust Requirements, so that the Parks Endowment Fund qualifies for GEF support and funding.

Background

In October 2002, the Bulgaria Park Endowment Fund (BPEF) has received the support of the Government of Bulgaria. The Fund concept has been approved and endorsed by the Ministries of Finance, Environment and Waters, and Agriculture and Forests. The Government commitment embraces a 5 years commitment of 12.5 million leva.(approx 6.25 m USD) The amount is pledged as a challenge, and its release is dependent upon other sources of money –primarily international.

During November 2002, the practical implications of incorporating the BPEF into the NTEF were examined. Recommendations were made for changes to the governance structure, and for changes to be incorporated into the project review and feedback mechanisms presently employed by the NTEF. In addition, the need to move the NTEF from operating a trust on a draw-down principle, to a mechanism aimed at fundraising, became evident. Finally, the implications of receiving a World Bank Forestry Project GEF grant were examined with Bulgarian counterparts.

Since this time, the NTEF Executive Director has been to the United States on an environmental training program, the World Bank/GEF Secretariat has approved the project preparation grant for the World Bank Forestry Project and GEF funds, and the criteria for GEF support of the BPEF have become more clear. USAID has received an assessment of the immediate assistance needed by the NTEF if the Parks Fund is to become a reality in 2003. The BCEG Project continues to work with the NTEF to identify additional sources of money to leverage GoB financing over the next five years.

In order to advance the institutionalization of the BPEF within the NTEF, the following tasks must be completed during 2003.

Bulgaria – Biodiversity Conservation and Economic Growth Project

Scope of Work #5

Business Development Specialist – Mr. Jared Hardner

Summary

Approval is sought for a consulting level of effort of 14 (fourteen) days for Mr. Jared Hardner, to continue providing key technical assistance related to the Project. Mr. Hardner's work for the BCEG Project will be conducted during the months of November/December, 2002. Mr. Hardner is considered key personnel under this Project's Task Order (Section F. 6 of IQC No. LAG-I-00-99-00013-00, Delivery Order 001).

Mr. Hardner is expected to contribute to the organization and structure of the newly approved Parks Endowment Fund. He will also work to ensure the Fund's design and operations are in keeping with GEF Conservation Trust Requirements, so that the Parks Endowment Fund qualifies for GEF support and funding.

Background

Since September, the Parks Endowment Fund has received the support of the Government of Bulgaria. The Fund concept has been approved and endorsed by the Ministries of Finance, Environment and Waters, and Agriculture and Forests. The Government commitment embraces a 5 years commitment of 12.5 million leva.(6.25 m USD) The amount is pledged as a challenge, and its release is dependent upon other sources of money –primarily international.

During August and September, the Project also managed to secure the interest of the Government of Bulgaria in linking a World Bank Forestry Project and its supporting GEF Grant, with development of the Fund. Discussions with the host Ministry (MOAF) and the World Bank indicated their receptivity. The GEF component addresses biodiversity conservation in forestry management and must receive the endorsement of the CBD focal point, the MOEW.

The BCEG Project succeeded in organizing the collaboration of the relevant Ministries (MOF, MOAF, and MOEW) in sending a joint request to the World Bank to provide \$2m USD as part of the World Bank GEF support to Bulgaria. This money is to be earmarked for the Parks Fund. This was reflected in a letter to the World Bank dated October 8, 2002, and signed by the three relevant Ministers. The Project must now work with the GOB and the Bank to ensure that the Parks Fund complies with all GEF Conservation Trust Fund conditionalities. In addition, the Parks Fund must be developed in parallel with the pdfB project design for the broader GEF Project to Bulgaria. The pdfB design work commences in December 02/January 03.

Tasks

1. Develop a familiarization with historical and prevailing GEF support for Conservation Trust Funds to date, and determine relevant conditionalities affecting their support for the Parks Fund in Bulgaria.
2. Work with the National Trust Eco-Fund (NTEF) to:
 - Develop a plan of action for negotiating and incorporating the Parks Fund within the Terms of Reference of the NTEF. This should include, and is not limited to operationalizing the Parks Fund within the NTEF as well as fundraising to increase its capital base;
 - Further develop the organizational structure and operational guidelines of the Fund to satisfy the statutes affecting the NTEF and the GOB contribution;
 - Develop a schedule of orientation and information sharing events for the NTEF Board, donors and others relevant to the Fund;
3. with representatives of the MOEW, MOAF and MOF to determine their requirements viz. the Fund; including conditionalities for releasing GOB contributions, and investment opportunities domestically, and off-shore;.
4. Liaise, in particular with the BCEG Project, the World Bank Task Managers, the GEF Regional Coordinator, and the PPU of the MOAF/World Bank Forestry Loan Project and the GEF component, to ensure that development of the Park Fund is fully integrated into the requirements of pdfB project design.

Outputs

A Report that addresses:

- Action Plan/proposal for establishing the Parks Fund and incorporating it within the NTEF. The Plan will address a timetable, set of activities, their expected results and proposed budget.
- Description of Capacity Building needs within the NTEF;
- GEF Conditionalities and how they can be addressed as part of the pdfB preparation
- Identification of additional international TA needs for the Parks Fund for 6-9months in 2003.
- GOB concerns and requirements.
- Debrief for USAID- Bulgaria

Proposed Schedule

- | | |
|--|------------------|
| ▪ GEF support of Conservation Trust examined | November |
| ▪ Travel to Commence on or about | November 17 |
| ▪ Arrival in Sofia | November 18 |
| ▪ Depart Sofia | November 27 |
| ▪ Liaise with World Bank and GEF Secretariat | thru December 16 |

- 4 days of coordination and contact with the World Bank, GEF secretariat, and other specialists related to GEF conditionalities and history with Conservation Trusts (domestic);
- 10 days in-country/travel (Bulgaria)

Supervisor

The consultant will be supervised by the BCEG Project Chief of Party and/or his designate.

In-Country Counterparts

Will be drawn from relevant Government ministries (MOEW, MOAF, and MOF), as noted above. The Consultant will work closely with the Executive Director of the NTEF, and his designates.

His visit will also overlap with the OECD-EAP Task Force evaluation team who will review the operations and impacts of the NTEF. It is important the Mr. Hardner address the new roles and responsibilities of the NTEF with this Team.

Appendix 7

**Summary
of the Costs-Benefits Analysis
for the Three National Parks**

**Republic of Bulgaria National Parks
Ministry of Environment and Waters**

Costs and Benefits

Preliminary Analysis – December 2002

Direct investments made by the Government and donors include the following:

- I. Operations and Maintenance Costs
- II. Capital Development Costs (Programs and Projects)

Financial Year 2002 (in Bulgarian Leva)

(Planned and approved)

National Park	Ministry Budget Operations and Maintenance	NEPF	Other*	Total BGL	Total employees
Pirin	310,000	459,800	1,500 82,400	853,700	44
Rila	501,489	371,650	112,738	985,877	81
Central Balkan	413,112	270,946	130,971 97,522	912,551	69
Totals	1,224,601	1,102,396	425,131	2,752,128	194

* includes USAID, Swiss, Eco Trust, and UNDP funds

Economic Benefits Generated by National Parks to the Bulgarian Economy

These calculations are based on information from socio-economic surveys conducted by USAID-GEF Biodiversity Project, between 1996-2001. Averages are for local income (or in-kind values) generated directly from Park-based activities. These figures do not include indirect market values such as fresh air, water, social, recreation, and other such values.

National Park	Revenue Source	Estimated Annual Amount in BGL	Area
Pirin	Non-timber resources, chalet nights, and special events	2,059,920	40,332.4 ha
Rila	<i>ditto</i>	4,136,848	81,046 ha.
Central Balkan	<i>ditto</i>	1,810,000	71,669.5 ha
	Total	8,006,768	193,047.9 ha

Explanation: Bulgarian National Parks Costs and Benefits

Preliminary Analysis - 2002

Direct investments include the following:

- I. **Operations and Maintenance Costs**
 - Salaries and benefits
 - Office rent (as appropriate)
 - Vehicle operations and maintenance
 - Communications
 - Office materials
 - Law Enforcement
- III. **Capital Development Costs (Programs and Projects)**
 - Infrastructure-Roads, Trails, Erosion control, shelters, water sources, signs
 - Building repair and/or construction
 - Visitor and/or information centers
 - Education and Interpretation
 - Staff Training
 - Research
 - Ecological Monitoring
 - Medicinal Plants management
 - Village and Regional Ecotourism
 - Other

Financial Year 2002 (in Bulgarian Leva)

(Planned and approved)

National Park	Ministry Budget Operations and Maintenance	NEPF	Other*	Total BGL	Total employees
Pirin**	310,000	459,800	1,500 82,400	853,700	44
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Totals	1,224,601	1,102,396	425,131	2,752,128	194

* includes USAID, Swiss, Eco Trust, and UNDP funds

** provided by Pirin National Park Directorate and BSBCP

Economic Benefits Generated by National Parks to the Bulgarian Economy

These calculations are based on information from socio-economic surveys conducted by USAID between 1996-2001. Average BGL amounts are for local income (or in-kind values) generated from Park-based activities.

N.B. Revenue values are generated based on extrapolation of data from representative survey samples of non-timber natural resource collectors, tourist buying practices, and overnight tourist facilities.

Unit values in BGL are based on averages for a unit measure of wild resource (e.g. kilogram, and price averages over the last 4 years, 1998-2001). These estimates are thought to be conservative. With additional and more specific wild resource assessment, this value could increase by as much as 30%.

Tourism revenue is only based on tourism nights spent in chalets inside the Parks. Revenue figures do not include day-visitor purchases at chalets, or income from goods, facilities, and services generated by visitors in proximity to Parks (e.g. Bansko, Borovets, Beklemeto).

Local income generation from tourism services does include estimates from the rental of horses, vehicles, and guides for events and/or activities conducted in the Parks, e.g. White Brotherhood Annual Summer PanEurythmia Celebration). These are minimum annual amounts.

Average person revenue/night in chalets is acquired from the Bulgarian Tourism Union, and were accurate as of 2001.

RILA

Total area 81,046 ha.

National Park	Revenue Source	Estimated Annual Amount in BGL	Comments
Rila (direct income generation)*	Projected from annual plans	80,000	* Revenues from hay collection/pasture, commercial NTFP collection, firewood
	subtotal	80,000	
Rila (Direct) Market values	Medicinal Plant, fruits, snails, and mushroom collection – gate value to local economy	3,498,659	
	Rila Chalets – local income (2001) gross est.	433,189	16 chalets
	Rila Local Income Generation from tourism services	125,000	Special events
	Total direct	4,136,848	
Indirect Market Values	Ancillary Tourism Water shed protection Water catchment and supply Carbon sequestration Air purification Public Health and Recreation	<i>Not calculated</i>	
* Revenues from hay collection, commercial NTFP collection, grazing, sanitary forestry			

Central Balkan

Total Area – 71,669.5 ha

National Park	Revenue Source	Estimated Annual Amount in BGL	Comments
Central Balkan direct revenue generation*	Projected from annual plans	35,300	* Revenues from hay collection/pasture, commercial NTFP collection, firewood
	subtotal	35,300	
Central Balkan (Direct) Market values	Medicinal Plant, fruits, snails, and mushroom collection – gate value to local economy	2,549,250	
	CB Chalets – local income (2001) gross est.	199,949	20 chalets
	CB Local Income Generation from tourism services	80,000	
	Total direct	2,864,499	
Indirect Market Values	Ancillary Tourism Water shed protection Water catchment and supply Carbon sequestration Air purification Public Health and Recreation	<i>Not calculated</i>	
Rila and Central Balkan National Parks	Total	7,001,347	

Pirin

Total Area – 40,332.4 ha

Without the results of socio-economic assessment of uses for Pirin National Park, it is difficult to calculate the direct benefits to the local economy. Projections do not include the large commercial ski area* that falls within the Park.

*NTFP value projections can be made by assuming productivity as a percentage of territory. The closest comparison is made with Rila National Park, as it shares a similar bio-geography to Pirin. This estimate is used advisedly.

National Park	Revenue Source	Estimated Annual Amount	Comments
Pirin direct revenue generation*	Projected from annual plans	70,000	* Revenues from hay collection/pasture, commercial NTFP collection, firewood
	subtotal	70,000	
Pirin (Direct) Market values*	Medicinal Plant, fruits, snails, and mushroom collection – gate value to local economy.	<i>Estimate</i> 1,740,000	
	Pirin Chalets – local income (2001) gross est.	<i>Not available</i>	
	Pirin Local Income Generation from tourism services	<i>Not available</i>	
	Estimated Total Direct	1, 810,000	
Indirect Market Values	Ancillary Tourism Water shed protection Water catchment and supply Carbon sequestration Air purification Public Health and Recreation	<i>Not calculated</i>	
* The Bansko Ski Areas falls almost entirely within the National Park. The terms and conditions governing the concession are not a matter of public record. Revenue received as a concession fee does not figure into these calculations.			

Summary

- ◆ National Parks contribute almost 9 million BGL to local economies. This amount is conservative, and does not include estimates for indirect market values. Decisions that affect the increase or decrease of this amount are directly linked to the regimes (activities) and norms (quantities) that are described in each National Park's Management Plan.
- ◆ National Parks generate 3.2 greater sums to the local economy than are invested in them each year.
- ◆ Value is added to certain National Parks non-timber natural resources as they move through the supply chain. The export value for commercially valuable species can be estimated at another 75-100% increase in "gate" values. This is true for mushrooms, *Vaccinium spp*, other fruits, and some herbs. This represents between 5 -7 million BGL per year, based upon seasonal productivity.
- ◆ At present, National Parks generate approximately 41.48 BLG/hectare in local value. Much of this sum is generated by the sustainable collection of non-timber natural resources. For this hectare yield to continue, very little investment is needed. This yield per hectare however, may drop in light of new management zones and their regimes. Reserves are not legally part of this production system.
- ◆ National Parks directly generate less than 185,000 BGL leva per year, total, in fees and taxes.
- ◆ National Parks based income generation is variable and extremely seasonal.
- ◆ It is highly likely that investments in National Parks infrastructure and special services for tourism will result in higher revenue generation. Examples include specialized tourist activities, viewing areas, and trails. When concessions/commercial contracts/rents are introduced, they could become a serious revenue generation tool. Unlike plant based natural resources collection, tourism development (and investments) must be seen as yielding a return on capital investments over a longer period of time. Investments should be subject to strict environmental impact controls and carefully examined for their ability to provide benefits to Park, local income generation, and limit negative environmental impacts.

Appendix 8

Study Tour Concept



E&E Regional
Participant Training Program



Training Concept Proposal *

For discussion by USAID Human Capacity Development Management Committee
(*Concept proposals should be brief. Approved concepts will be further developed.)

1. USAID Partner		
Formal name: <i>Bulgaria Conservation and Economic Growth Project (BCEG)</i>		
<input checked="" type="checkbox"/> Contract	<input type="checkbox"/> Grant	<input type="checkbox"/> Cooperative agreement

2. Ongoing Project to be Supported through Training
USAID Strategic Objective number:
USAID Intermediate Result(s) number(s):
<p>Name, dates and brief description of project (goals, activities):</p> <p>The BCEG Project is designed to support the practical implementation of USAID supported national park management plans. Management plans guide activities and investments in park -focused biodiversity conservation management and monitoring, and tourism projects, as well as in the generation of income for local communities and that engage them in park management activities. Additional project results have included the establishment of new financial mechanism for park income generation and financial sustainability. Selective public information and education campaigns and materials support all these activities.</p> <p>The most significant outputs of this project to date that continue to receive USAID support are - (1) the development of a draft national eco-tourism strategy (NETS) to guide national ecotourism policy, activities, and investments. (2) The second major result is the Government acceptance and pledge of 6.25 million USD over the next five years to the country's first conservation endowment fund - to finance conservation projects and ecotourism development in relation to the national protected area network.</p> <p>The Bulgaria Parks Endowment Fund is an important long-term tool designed to support the financial sustainability of the nation's protected areas. It's the first independent, autonomous fund for protected areas in the country, and first in Eastern Europe. The Fund has been designed to capitalize on the efficiencies and accountability of the existing National Trust Eco Fund. The NTEF was first designed to manage and administer Bulgaria's first debt-for-environment swap. It has already demonstrated the efficient management of 20 million Swiss Francs for environmental management improvements. It operates to World Bank and Bilateral donor accounting and reporting standards, but has limited experience in operating and managing biodiversity conservation, and park-focused grants. In addition, the NTEF has no previous experience in administering an endowment fund. Consequently, it needs to develop capacity in both biodiversity and protected areas grant management, as well as in the administration of endowment funds. In addition, a key part of its future operations will be dedicated to fundraising from private foundations, the private sector and donors, in order to match the GOB commitment.</p> <p>The NTEF is comprised of a Governing Board, an Advisory Council, and an Executive Bureau</p>



3. Training Objectives

After training, what actions should participants be able to take using the new knowledge, skills and attitudes?

Members of the NTEF and its governing board will be able to:

Identify and implement aspects of fund operations and management in support of biodiversity conservation, protected area development, and associated private-public income generating activities in communities associated with these parks.

Identify and employ fundraising strategies and tools to capitalize the Endowment of the Parks Fund, and to capture the Government commitment;

Identify and implement project management systems that offer best value for money to the future grant administration and management of NTEF and BPEF.

Employ the most effective communication and coordination strategies between grant recipients and the Government bodies to ensure that lessons learned are captured and shared to best effect.

4. Participants

Number: 8 members of the National Trust Eco Fund Board of Trustees, Advisory Council and Executive Bureau

Profile (job types, levels or roles -- names not necessary here):

Board of Trustees (Government Board)	3
Advisory Council	2
Executive Bureau	3

5. Duration and Location of Training

<input checked="" type="checkbox"/> 2 weeks in US	<input type="checkbox"/> 3-5 days in BG	<input type="checkbox"/> 1 week in third country	<input type="checkbox"/> other (explain below)
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Reason for this location (e.g., relevant models or examples? partnership opportunities?)

The United States offers some of the best models for trust (endowment) fund operations and management in the world. While there are some 60 international conservation trusts established, the US still offers some of the strongest and most successful models for trust funds operated in support of protected areas and biodiversity conservation. In order to minimize the language barrier with Asian, Latin American, African or even European funds, we believe it best to concentrate on lessons and applications in a common language. The strongest models exist and are readily accessible in the state of California. Northern California has trust funds of private money that complement public monies from the annual budget for Golden Gate Park, the State Parks, and Yosemite National Park. Three different funds, all involved in project management and administration, grant management and administration, fundraising, etc., for public protected areas. NTEF could visit all of these in one trip and get a relatively rapid appreciation and insight to the different styles of general fund management. At the same time, they could possibly meet with foundations in the same business (Packard (Hewlett Packard and Moore (Moore Foundation of Intel fame), as well as conservation groups that set up trusts for land management (The Nature Conservancy TNC, Trust for Public Land, Peninsula Open Space Trust. These organizations manage 10s to 100s of millions of dollars a year in Northern California.

In this manner two immediate opportunities are realized – fund operation and management, as well as important contacts established with potential conservation donor foundations.

6. When would you like this program to take place?

September - November 2003

7. Requested Components (List specific site visits, technical topics, meetings, etc.)

- Meetings with relevant Fund and Organization managers;
- Visits to grant recipients and to learn of both impact and process indicators, and levels of satisfaction;
- Meetings and visits with appropriate private foundation management teams;
- Introduction to Fund management programs (including mechanism and tools);
- Review of fundraising strategies, approached and tools.

8. Follow-up

After training, how will participants be supported to apply new knowledge and skills?

Technical assistance and financial support to the NTEF is being provided by USAID through the BCEG Project. USAID will support a year-long process of capacity building, international technical assistance, fundraising assistance, and partial capitalization of the Parks Endowment Fund. Study Tour participants will have a direct and immediate role to play in the existing and future operations of the BPEF.

9. Other comments:

This PTP request forms an important part of the BCEG Project extension designed to result in the capitalization of the BPEF and the development of the capacity of its Governance structure and functions to successfully operate the BPEF. Fund establishment is considered a legacy of USAID support to biodiversity conservation for the last 10 years, and a logical part of its graduation strategy.

In addition, the Project's international Fund technical advisor is knowledgeable and well connected with the Californian fund organizations identified above. He can provide expert advice and facilitation of the Study Tour as needed.