



The “Modernisation of Higher Education Institutions” procedure in Bulgaria: Lessons for Educational programming – Interim Evaluation

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Purpose and scope of the interim evaluation

Technical Report

Modernisation of Higher Education Institutions Procedure in Bulgaria

Interim Evaluation and Lessons for education programming



In 2024, the OECD conducted an interim evaluation of Bulgaria's *"Modernisation of Higher Education Institutions"* procedure.

Key facts on the procedure:

- implemented between August 2020 and December 2023 under OPSESG
- Aimed enhance labour market alignment through introducing a competency model and multi- or interdisciplinary training for students, including through digital transformation

The evaluation identifies lessons from the completed activity to inform the current and future initiatives for higher education under European-funding programmes.

For the full report, visit the OECD website or scan the QR code





Overview of the evaluation criteria

Relevance

To what extent do activities respond to clear needs and priorities in the Bulgarian system, and target the most significant barriers preventing positive transformations in Bulgarian education? To what extent do they leave important priorities unaddressed?

Coherence

What are the synergies and inconsistencies between Operational Programme activities and the other programmes, policies, practices, actors, and national and European strategies that form the Bulgarian education system, as well as between the different elements of specific programmes and procedures?

Effectiveness

How successful has the activity been in achieving or progressing towards its objectives and desired outcomes and impact?

Efficiency

What is the relationship between the resources used and changes generated?

EU added-value

Has the activity introduced changes that might not have happened without EU's support and cooperation?

Sustainability

What is the likelihood that the effects of the policies and programme will last beyond the implementation period?



Research design and data collection methods



Qualitative approach, informed by a realist methodology



Document review: Analysis of policy documents, programme guidelines, and monitoring reports (i.e., technical and financial reporting documents), provided insights into programme design and implementation



Focus group with HEIs: 7 beneficiary institutions participated (held in June 2024), allowed to gather a preliminary understanding of beneficiaries' experiences



Interviews with stakeholders: 16 semi-structured interviews with public officials, NGOs, HEIs, and business representatives, with participants selected based on their knowledge and role in the programme



Site visits: Visits to 3 higher education institutions to gather in-depth insights on implementation in small and large institutions (focus groups were held with project managers, financial staff, and academic participants)



Limitations: Limited engagement with unsuccessful applicants; insufficient data on long-term outcomes (e.g., skills application, institutional improvements); potential response bias from interviewees with vested interests; but triangulation of data helped offset some limitations



Summary of key findings





The procedure achieved many of its objectives and helped the higher education system adopt new technologies and practices

Aligned with national priorities, EU and national guidelines

Built basic digital skills and set the stage for competency-based education

Encouraged inter-institutional educational collaboration

Expanded professional development opportunities for academic staff

Supported mobility for smaller universities without international networks

Provided an opportunity for stakeholders to submit public comment on methodology and criteria for selection

Managed efficiently and transparently

Provided guidance and advice to stakeholders effectively



Some elements were less successful

Funding spread thinly
across many activities
with weak synergies

Lack of sustained expert
advice throughout the
procedure

Minimal use of
qualitative criteria
limited the evaluation of
proposals

Grantee monitoring
focused on compliance
rather than learning and
improvement

Lack of coherence
between key activities
and Bulgarian law caused
some delays or lower
take-up

1. Objectives and design of activities



1. Objectives and design of activities: Interviewees felt the Modernisation procedure aligned well with national higher education priorities but achieving systemic impact was more challenging

1.1. STRONG ALIGNMENT WITH NATIONAL AND INSTITUTIONAL PRIORITIES:

- Addressed key higher education priorities in Bulgaria (e.g., digitalisation and competency-based education, supported collaboration between institutions, businesses, and policymakers)
- Helped modernise teaching methods, but impact remained limited by resource constraints

1.2. CHALLENGES IN ACHIEVING SYSTEMIC IMPACT

- Funding was modest compared to other ESF+ initiatives, limiting institutional participation
- Broad scope spread resources thinly, reducing depth in addressing key priorities
- Not enough incentives for long-term, multi-institutional partnerships to sustain reforms

1.3. NEED FOR STRONGER AND MORE TARGETED CONSULTATION PROCESSES

- Followed EU and national guidelines but expert advice could be stronger and more sustained
- Large advisory bodies ensured broad input but limited in-depth, technical insights
- Future initiatives could benefit from structured expert panels and more targeted consultation.
- Opportunity to further build collective view of role and scope of expert advice in HE sector?

2. Selection of projects





2. Selection of projects: The project selection process was transparent and impartial, but some felt it relied too heavily on quantitative scoring, limiting the assessment of project content and logic



2.1. PROCEDURE COMPLEXITY REDUCED EFFICIENCY

- Wide and diverse range of activities made proposals difficult to design, evaluate, and manage
- A more structured approach, such as separate funding streams, could improve clarity and efficiency



2.2. PROJECTS WERE SELECTED THROUGH AN OVERLY QUANTITATIVE ASSESSMENT

- Project evaluation used a rigorous methodology, ensuring impartiality and transparency.
- Scoring largely (75%) formula-based, limiting expert review of content and logic of proposals.
- Including more qualitative criteria—such as labour market relevance and institutional capacity—could strengthen project impact.

TECHNICAL AND FINANCIAL CRITERIA

| 1. Strategic significance | 2. Result orientation | 3. Compliance | 4. Efficiency and effectiveness |
|---|--|--|---|
| Rating of the higher school – lead partner 15% <i>(a positional mean value is applied – quintile)</i> | Contribution to achievement of indicators 20% <i>(a positional mean value is applied – quintile)</i> | Identification of the target groups 5% | Project effectiveness 10% <i>(a mathematical model is applied)</i> |
| Regional significance 10% <i>(a mathematical model is applied)</i> | Focus on young teachers 5% <i>(a mathematical model is applied)</i> | Composition of the partnership 10% | Efficiency of direct staff costs 15% <i>(a mathematical model is applied)</i> |
| | | Focus of the project proposal 10% | |

3. Implementation of projects by beneficiaries





3. Implementation of projects by beneficiaries: Implementations was slowed due to legal and financial constraints, but targets were met

3.1. IMPLEMENTATION WAS SLOWED BY LEGAL CONSTRAINTS BUT SUPPORTED BY HIGH LEVELS OF COLLABORATION AND THE MANAGING AUTHORITY

- Some key activities of Modernisation could not be implemented without changes to the law and regulation
- Implementation difficulties also arose from COVID-19, institutional inflexibilities and sometimes overly-ambitious collaborations
- Guidance and advice by Managing Authority staff was highly valued by beneficiaries and judged an important assist to implementation
- Successful project implementation required a potentially unsustainable level of commitment from academic staff

3.2. COMPETITION FOR FUNDING WITHIN AND BETWEEN HEIS WAS SOMETIMES AN IMPEDIMENT TO THE IMPLEMENTATION OF JOINTLY-DEVELOPED PROGRAMMES

- Higher education funding frameworks made some educational collaboration among HEIs more challenging

3.3. SOME ADMINISTRATIVE INFLEXIBILITIES CREATED DELAYS, BUT TARGETS WERE MET

- Limited flexibility, burdensome contract modifications, and procurement difficulties slowed implementation
- However, non-fulfilment of indicators by beneficiaries were infrequent and beneficiaries did not experience financial risk that deterred ambitious project planning

4. Monitoring, reporting, and learning





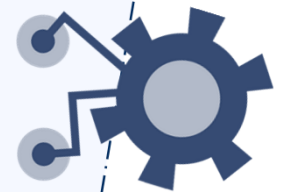
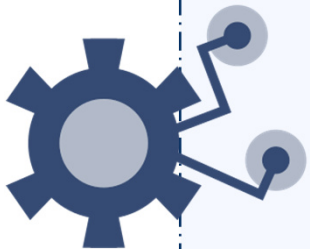
4. Monitoring, reporting and learning: While there was extensive reporting and evidence collection, there were important financial simplification efforts

4.1. REPORTING AND EVIDENCE COLLECTION PROCEDURES WERE FELT TO BE BURDENSOME, WHICH CREATED EFFICIENCY CHALLENGES

- Despite simplifications efforts, both HEIs and the Managing Authority faced a heavy administrative burden related to reporting

4.2. THERE WAS A LACK OF LEARNING BOTH DURING AND AFTER THE IMPLEMENTATION OF SUPPORTED PROJECTS

- Monitoring and evidence collection supported financial and technical compliance, but not learning and improvement
- Modernisation did not contain beneficiary peer learning during implementation or feedback at the conclusion of the activity





5. Outcomes, sustainability, and EU added-value





4. Outcomes, sustainability and EU-added value: Modernisation had the greatest impact when it built on existing strengths and addressed institutional needs, but faced more challenges when striving for innovation

4.1. MODERNISATION WORKED BEST WHEN BUILDING ON EXISTING STRENGTHS BUT FACED CHALLENGES WHEN INTRODUCING NEW APPROACHES

- Training, mobility, and digitalisation initiatives were the most sustainable as they aligned with staff interests and institutional priorities.
- Innovations like joint programmes and competency-based learning were harder to sustain without continued funding or clear institutional benefits.

4.2. WHILE SOME JOINT PROGRAMMES MIGHT NOT CONTINUE, THE PROCESS FOSTERED A CULTURE OF EDUCATIONAL COLLABORATION AMONG BULGARIAN HEIs

4.3. COMPETENCY-BASED PROGRAMMES ALIGNED WITH EMPLOYER NEEDS AND WERE POPULAR AMONG STUDENTS, AND DIGITALISATION EFFORTS VARIED IN IMPACT

4.4. PROFESSIONAL DEVELOPMENT OPPORTUNITIES ADDRESSED IMPORTANT NEEDS, BUT EVIDENCE OF IMPACT IS LIMITED

4.5. MOBILITY FUNDING BENEFITED SMALLER UNIVERSITIES WITH FEWER INTERNATIONAL CONNECTIONS, BUT UPTAKE WAS LOWER THAN ERASMUS+



4. Outcomes, sustainability and EU-added value: Modernisation had the greatest impact when it built on existing strengths and addressed institutional needs, but faced more challenges when striving for innovation

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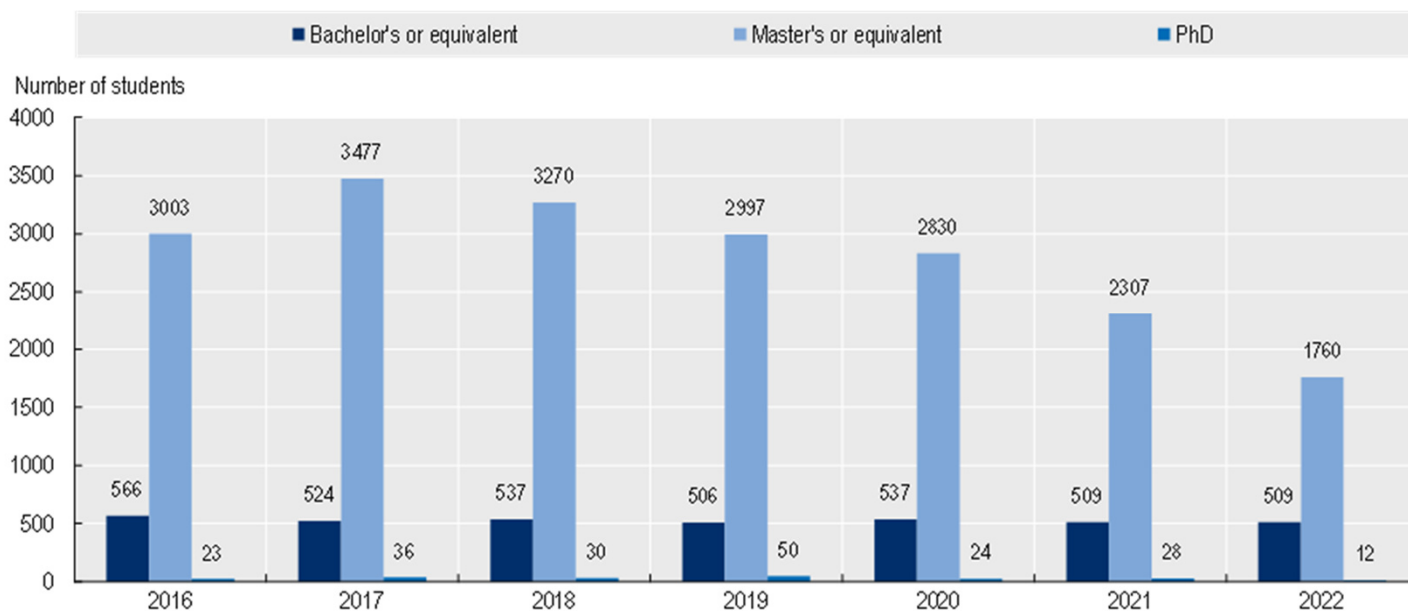
COMPETENCY-BASED PROGRAMMES ALIGNED WITH EMPLOYER NEEDS AND WERE POPULAR AMONG STUDENTS, AND DIGITALISATION EFFORTS VARIED IN IMPACT

PROFESSIONAL DEVELOPMENT OPPORTUNITIES ADRESSED CRITICAL GAPS, BUT IMPACT IS UNCERTAIN

MOBILITY FUNDING BENEFITED SMALLER UNIVERSITIES WITH FEWER INTERNATIONAL CONNECTIONS, BUT UPTAKE WAS LOWER THAN ERASMUS+

The number of credit mobile graduates under Erasmus+ has been declining

Credit mobile students (at least 3 months abroad) of bachelor's students 2016-2022



Note: Only credit mobility under EU programmes (i.e. Erasmus or other EU programmes) are included.
Source: Eurostat (2024^[24]), *Credit mobile graduates (at least 3 months abroad) by education level, type of mobility scheme, type of mobility and sex*, https://ec.europa.eu/eurostat/databrowser/product/page/EDUC_UOE_MOBC01.



Promising practices



The procedure features a number of promising practices that can be carried forward



Provided **ample opportunities to submit public comments** on the methodology and criteria for selection of beneficiaries, and the guidelines for applicants, with detailed written feedback provided to all commenters



Expanded professional development opportunities for academic staff, focusing on language and digital skills, beneficial to their responsibilities as teachers and researchers – crucial for an increasingly digital teaching and learning environment



Helped **expand the capacity of HEIs for digitally-enhanced teaching and research**, laying foundations for long-term digital transformation



Demonstrated the feasibility and mutual benefit of collaboration between **HEIs in sharing responsibility for curriculum development and teaching**



Provided an opportunity to move towards a **competency-focused redesign of curriculum and pedagogy** aligned with the skill demands of professional practice and proved attractive to students, instructors, and employers



Lessons & Recommendations





Lessons & Recommendations

Clarifying priorities and focusing investment is necessary for greater impact

Future procedures would benefit from **focusing on a smaller set of critical areas** to maximise impact. **Separating funding categories** for digitalisation, competency-based education, and internationalisation **could ensure better resource allocation**.

Build an enabling environment via strengthened stakeholder engagement during the initial stages of programming

Future procedures could **incorporate ongoing expert input and insights from those implementing projects to ensure relevance and feasibility**.

Monitoring can be used to support learning and improvement, not only for compliance

Future procedures could involve **earlier discussions on evidence needs and introduce innovative data collection methods to improve evaluation quality**.

Project selection can go beyond heavy reliance on indicator-based scoring, balancing rigour and relevance

Future procedures could **refine selection criteria to combine quantitative measures with expert judgment, ensuring alignment with programme goals**.

Simplifying financial management, reporting, and contracts can make implementation more efficient and supportive

Future procedures could **identify and implement administrative simplifications to reduce the burden on beneficiaries and the Managing Authority while maintaining accountability**.

Integrating structured learning opportunities can refine and improve projects

Future procedures could integrate **peer learning opportunities to share best practices, improve project outcomes, and ensure long-term impact**.



Thank you!

